Job Summary

This is a full-time on-site role for a Client Services Associate in our Dallas, TX office. The Client Services Associate will be responsible for providing exceptional customer service and support to our clients. Job requirements include strong communication skills, eagerness to learn, self-starter, proactive, ability to work alone and as a team member, detail oriented, strong organizational skills, and a strong customer service mentality. The job responsibilities include execution of service requests, maintenance of portfolio data, client data management in CRM, preparation of custodian and internal paperwork, and an eagerness to go above and beyond.

Qualifications

- The Client Service Associate typically requires:
- 3-5 years of experience in Financial Services Industry
- Bachelor's degree from accredited college or university
- Proficiency with Microsoft Office
- Experience with Salesforce is a plus
- Experience with Orion Portfolio Solutions is a plus
- Excellent client service skills
- Excellent communication skills
- Excellent organization skills
- Attention to detail

Primary Responsibilities

- Address external and internal service requests
- Manage data in CRM (Salesforce)
- Custodial and internal form preparation and processing
- Willingness to accept tasks no matter how big or small
- Follow departmental and firm Standard Operating Procedures

Secondary Responsibilities

- Provide coverage to other Client Service Associates
- Assist compliance officer
- Assist in creation and maintenance of Standard Operating Procedures/workflows

Salary and Benefits

- Salary based on experience.
- Medical, Dental, Vision, Flexible Spending Account, Health Savings Account
- 401 (k) with company match
- Employee Profit Sharing Bonus Pool
- Industry
- Financial Services
- Employment Type
- Full-time