Senior Client Service Associate

Stephen's Wealth Management Group (SWMG) is a well-respected and nationally recognized comprehensive wealth management firm, with a strong history dating back to 1975. It is our mission to enable clients to confidently plan for a future that inspires. We do that, in part, by living our firm core values: Integrity, Collaboration, Excellence, Innovation, and Community Conscious. SWMG, an independent RIA, has a team of twelve employees made up of Wealth Advisors, Client Service Associates (CSAs), and Operational professionals. We look forward to adding a full-time Senior Client Service Associate.

Are you passionate about helping clients meet their financial goals? If you pride yourself on delivering exceptional client service, have superior analytical capabilities, and are detail oriented, then this role may be a good fit. The position requires a proactive person with strong collaboration skills, the ability to multi-task while maintaining accuracy, and a strong command of time management. Trustworthiness and honesty are crucial, as the position requires the ability to work with highly confidential information. The position is based near Flint, MI, with flexibility to work from home ~1 day/week once fully oriented.

SWMG offers a team environment, a reputation for excellence, an established client base and growth potential to help you reach your personal goals. You will also be part of a forward-thinking firm, engaging in continuous development in alignment with the profession and our desire to serve clients and provide trusted advice.

What You Will Be Doing

You will serve as the front-line representative of the organization to clients; build strong working knowledge of each client and their needs; assist clients with issues and concerns; research solutions to challenging or complicated needs; prepare client correspondence and develop presentations, reports, meetings agendas, letters, forms, etc.; maintain records associated with client meetings and phone calls; and actively manage and track the completion of all action items in our Client Relationship Management (CRM) system.

- In close collaboration with the Investment and Financial Planning Teams, prepare client review materials to include client goals, performance, and related information.
- Complete all post client meeting requirements including comprehensive meeting notes, assignment of meeting actions to self and others, and close-out communication with the client.
- Ensure documentation of all client correspondence and communications in the firm's CRM – Advisor Engine,
- Complete all client actions per agreed upon timeframes,
- Proactively respond to calls from clients; research and follow-up in a timely manner, and
- Actively participate in firm meetings, sharing ideas, feedback, etc.

What You Will Need for this Position

The following knowledge, skills, and abilities are required to effectively meet the needs of the position.

- Superior client service skills, with a keen desire to not only meet client expectations, but to go above and beyond to ensure extreme client satisfaction,

- Exceptional attention to detail and accuracy, to include personal quality assurance practices,
- A positive, can-do attitude with clients and teammates, and capable of working both independently and as part of a team,
- High level of proficiency with the entire MS Office suite, and the ability to learn new technologies,
- Able to operate in an environment requiring high levels of organization, flexibility, resourcefulness, and the ability to multi-task,
- Experience working with insurance (i.e., annuities, long term care, life, etc.),
- At least seven years of experience as a CSA within the wealth management profession,
- Bachelor's degree (desirable),
- Paraplanner certification (desirable), and
- Experience supporting employer retirement plans (e.g., 401(k), 403(b), etc.) (desirable).

Benefits

- Merit-based performance bonus
- Healthcare coverage
- Employer-matching 401(k)
- Paid vacation and personal time
- Focus on employee development

We are proud of our diverse environment, EOE, M/F/D/V

If interested, please provide your resume to Kim Waldman at kim.waldman@stephenswmg.com.