Client Service and Marketing Associate

About Prosperity Wealth Planning

Prosperity Wealth Planning is a boutique financial planning practice that respects and cares about our team as much as we do our clients. Our clients are working professionals, retirees and families with a minimum of $500,000 in investable assets. With our core values of simplicity, transparency, and progress, we are driven to transform clients into members of our family and ultimately, firm advocates through the successful use of client-centric fiduciary standards and values-based financial planning.

Position Description

The Client Service and Marketing Associate is a full-time, hybrid position and will be exposed to many service and marketing related facets of the firm. A wide variety of ad hoc projects will be assigned to acquaint the candidate with the practice's everyday workings.

Compensation and Benefits

The position pays $30.00 - $35.00 per hour and is eligible for an annual discretionary performance bonus. Benefits include medical insurance, 401k retirement plan and paid time off.

Work Location

The hours of the position are Monday through Friday 8am – 5pm. This is hybrid position and requires that the employee work in the office in Irvine, 3-4 days per week. No relocation assistance is offered and applicants must be available for an on-site interview.

Essential Position Responsibilities

- Maintain marketing plan, including ongoing communication efforts.
  - Coordinate firm marketing projects.
  - Create and maintain annual marketing calendar.
  - Support website construction and maintenance.
- Promote firm business development initiatives.
- Work alongside the firm's Client Services Director to assist with new client onboarding and existing client service-related requests.
- Support Financial Planning Team in pre- and post-client meeting preparation.
- Answer routine client questions and account-related requests.
- Participate in planning for and attending events to promote current and prospective client awareness of the firm.
- Schedule and coordinate client meetings, calls, and follow-ups.
- Maintain accurate and up-to-date client records in CRM.
- Other job responsibilities as assigned.

Professional Qualifications

- Bachelor's degree in a related field preferred and/or equivalent experience.
- 2+ years of professional work experience in the financial services industry.
- Additional experience in client service and marketing/digital media strongly preferred.
- Highly organized with strong attention to detail and ability to manage multiple priorities.
- Exceptional written and verbal communication skills (with impeccable grammar).

- Strong client-first mindset.
- Technologically savvy, with intermediate skills in Microsoft Office Suite, specifically Outlook, Word and Excel.
- Proficiency with CRM and financial planning technology tools a plus.
- High ethical standards and respect for client confidentiality.
- Ability to pass an extensive background check.

Personal Attributes

We are a small team that is committed to the work we do. While we have well-defined roles, we also have an "all hands" approach to projects and deadlines. We know that teamwork is how we will best serve our clients. The Client Service and Marketing Associate will be someone that enjoys variety in their day-to-day, is adaptable to change and accurate in their work. They will have a personal commitment to excellence that shows every day.

How to Apply

Thank you for your interest in the Client Service and Marketing Associate position available with Prosperity Wealth Planning! Please submit your resume and letter of interest for consideration. We are unable to accept direct inquiries about this position (i.e. phone calls, emails).