



## Job description

**Job Title:** Operations and Client Services Coordinator

### **About Rembrandt Financial Group**

Located in the heart of West Austin, Rembrandt Financial Group is a boutique wealth management firm dedicated to helping clients navigate the complexities of financial independence. Our philosophy is built on a foundation of holistic planning and deeply personalized service. As we continue to grow our presence in the Austin community in 2026, we are looking for a dedicated Client Relations & Marketing Coordinator to serve as the face of our firm and a vital pillar of our operational success.

### **The Role: Client Service and Firm Administration**

In this pivotal role, you will be the primary point of contact for our high-net-worth clients, ensuring that every interaction reflects the excellence and transparency our firm is known for. You will manage the client onboarding journey, maintain our critical CRM databases, and oversee day-to-day office administration to ensure our boutique environment remains professional and efficient. Your ability to listen to clients and build an atmosphere of trust is essential to maintaining our multi-generational relationships.

### **Strategic Coordination: Calendars, Meetings, and Travel**

As a coordinator, you will act as the master of logistics for our team. You will be responsible for the complex management of calendars, proactively identifying and resolving scheduling conflicts to ensure our advisors can focus on client goals. Your duties include preparing high-quality digital materials for client reviews, organizing internal strategy meetings, and managing all aspects of professional travel. Whether it is coordinating a local meeting at our Austin office, with Houston clients or arranging multi-city travel for industry conferences, your attention to detail will ensure every trip and meeting is executed flawlessly.

### **Local Events and Community Growth**

Beyond administration, you will help drive our brand's physical presence in Austin by planning and executing local marketing events. This includes organizing client appreciation gatherings, educational seminars on topics like retirement planning or social security, and community outreach programs designed to foster local relationships. You will be responsible for the logistical success of these events—from venue selection and invitation management to the creation of marketing collateral—ensuring that Rembrandt Financial Group remains a visible and trusted leader in the Austin financial landscape.



# REMBRANDT FINANCIAL GROUP, LLC

## **Benefits**

We offer a competitive salary along with full benefits, including vacation, health insurance and a 401k.

## **Qualifications**

The ideal candidate for this 2026 opening possesses 2–4 years of experience in a client-facing or marketing role, preferably within the financial services or luxury hospitality sectors. You must be highly proficient in Microsoft Office 365 and CRM platforms like Wealthbox and Redtail, with a demonstrated ability to multitask in a fast-paced yet polished environment. Strong verbal and written communication skills are paramount, as is a proactive "client-first" mindset.