Contact: Andy Klausner
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Job Title
Client Service Associate (Wealth Management)

Company
Confidential

Location
Los Angeles (Century City), CA

Job Type
Full-Time, In-Office, 9:00am – 5:00pm

Salary
$50,000 - $75,000, depending on experience

About the Company
A Boutique Wealth Management firm that works with high-net-worth individuals and families to help them achieve and maintain their financial goals throughout their lifetimes and into future generations. The firm works with many third and fourth generation families The firm offers a comprehensive range of planning services, including wealth transfer and gifting, insurance and investments.

Job Description
The Client Service Associate supports the administration of the practice to allow the Advisors to focus on effective revenue production and a high-quality client experience. This position also supports the continuation of an efficient, effective, and organized office. The Client Service Associate also helps with creating financial plans and trading client accounts. The Client Service Associate works with the entire team as well as interacting with clients on the telephone and when visiting office.

Responsibilities

Administrative

- Organize & retain notes, account paperwork and documents, files, etc.
- Assist with telephone calls, scheduling and other general administrative tasks
- Contact clients to follow up on requests, facilitate document completion and to maintain current client information
- Monitor and expedite any outstanding business processing requirements, including billing

Business Production

- Assist in onboarding new clients
- Assist in preparing financial plans
- Support investment management information requests
- Create finalized meeting materials [digital and/or physical]
- Performing trading functions
- Produce performance reports

Experience and Qualifications

- Bachelors' Degree (business-related preferred)
- Series 7 & 63 or 65/66 licensed, preferred (or desire to attain soon after hiring)
- 1-3 years of administrative/operations experience, industry experience preferred
- Proficient in utilizing Microsoft Office, specifically Outlook, Word and Excel
- Proficient in utilizing Microsoft Access, preferred
- Experience with LPL back office, preferred
- Experience with CRM, preferred
- Organizational and planning skills and attention to detail
- Flexibility, adaptability and the ability to multi-task

Competitive benefits package offered, including medical and parking.