Contact: Andy Klausner
andy@akadvisorypartners.com
(617) 990-6894

Job Title
Client Service Associate (Wealth Management)

Company
Confidential

Location
Jericho, NY

Job Type
Full-Time

Salary
$80,000 - $100,000 plus bonus

Industry
Financial Services / Wealth Management

About the Company
A Wealth Management firm that works with families and businesses to help them execute and maintain their financial goals throughout their lifetime and for future generations. The firm offers planning services, insurance and investments.

Job Description
The Client Service Associate supports the administration of the practice to allow the Advisor to focus on effective revenue production & quality client experience. This position also supports the continuation of an efficient, effective, and organized office. This position works with the entire team as well as interacting with clients on the telephone.

Responsibilities

Administrative

- Organize & retain notes, documents, files.
- Manage phone calls/calendars/schedules/office supplies.
- Contact clients to follow up on requests, facilitate document completion, and to maintain current client information.
- Monitor & expedite any outstanding business processing requirements.

Business Production

- Onboard new insurance business.

- Onboard new investment business.
- Support investment management requests.
- Create finalized meeting materials [digital and/or physical].
- Performing cashiering functions
- Running performance reports in Envestnet, Morningstar and NMCIR

Experience and Qualifications

- Bachelors' Degree (business-related preferred)
- 3-5 years of administrative/operations experience
- Proficient in utilizing Microsoft Office, specifically Outlook, Word and Excel
- Series 7 & 65/66 licensed, preferred
- Insurance license, preferred
- Organizational and planning skills and attention to detail
- Flexibility, adaptability and the ability to multi-task