AKADVISORY PARTNERS LLC
Unlocking Real Value

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Job Title
Licensed Client Service Advisor (Wealth Management)

Company
Confidential

Location
Dallas, TX

Job Type
Full-Time

Salary
$75,000 - $85,000 plus bonus

Industry
Financial Services / Wealth Management

About the Company
Our client is a boutique Wealth Management firm that works with families and businesses to help them execute and maintain their financial goals throughout their lifetime and future generations. The firm offers planning services, insurance, and investments. Core values of the firm include honesty, discipline, and passion as they build long-term relationships with clients.

Job Description
The Client Service Associate will assist the firm's advisors in new business paperwork and proposals and work with other members of the home office team, including compliance to ensure that client requests are met on a timely basis. The Client Service Associate will also work with clients on a regular basis, fulfilling requests. You must have strong organizational and analytical skills and a keen sense of detail and be a team player and a self-starter.

Responsibilities

· Responsible for opening new accounts and for maintenance of existing accounts.
· Provide account administration services to advisors and communicate with them on a regular basis.
· Provide valuable operations advice and support to other team members.
· Meet and exceed advisor account needs and service expectations.
· Keeping advisory and client service team informed regarding client activity.

Experience and Qualifications

· Series 7, Series 65/66 and Insurance Licensed
· 3-5 years of client service experience
· 3-5 years of investment experience