**Client Service Associate**

Laurel Wealth Planning is seeking a Client Service Associate, who will play a critical role in fulfilling client needs. As the first person to greet clients when they call or visit, the CSA creates a lasting positive impression, greeting with warmth and attentive listening.

The CSA works closely with other members of the client service and wealth management team to fulfill client requests and carry out operational and administrative tasks for the firm

This is a full-time position that offers substantial benefits. It may lead to advanced client service roles, a paraplanner position or other roles depending on contribution and skills.

**Essential Duties & Responsibilities:**

* Welcome clients and visitors and maintain hospitality.
* Meet client service needs via telephone, Zoom, email and in person.
* Manage meeting scheduling.
* Conduct client account work such as establishing new accounts, completing money transfers, sending quarterly investment results; sending forms via DocuSign; scanning documents; and activating a client portal.
* Work closely with Wealth Managers to prepare materials for client meetings and implement follow-up steps.
* Suggest process improvements and enhancements.
* Gather regulatory information and provide compliance support.
* Manage office supplies and environment; mail; printing services.
* Support employees through benefits paperwork and team-building events.
* Data entry into client relationship management (CRM) system.
* Complete quarterly reports/billing pre-work.

**Knowledge, Skills and Abilities:**

* Warm, friendly and caring style.
* Strong verbal and written communication skills.
* Highly organized with strong attention to detail.
* Effective collaboration and teamwork.
* Dedicated and focused.
* Comfortable with technology and data entry. Familiarity with Microsoft Word, Excel and a CRM.
* Ability to multitask and plan/prioritize own work activities.

**Education/Experience:**

* Associates degree required. Bachelor’s degree preferred.
* 1-3 years of office administrative experience, financial services a plus.

**Compensation**

* Base: Based on skills and experience; eligible for overtime.
* Bonuses: Based on team success.

**Benefits**

* Individual and family health insurance benefit, contribution to HSA.
* Company-paid disability income and life insurance.
* Company contribution into 401(k) plan immediately.
* Flexibility during the workday for personal needs.
* Paid time off.
* Potential hybrid work schedule after 6 months with strong performance
* Tuition reimbursement for approved undergraduate and graduate courses.
* Company paid licensing and credentialing.

For over 20 years, [Laurel Wealth Planning](http://www.laurelwealthplanning.com/) has served clients with comprehensive financial planning and proactive investment management. We are passionate about helping people live the lives they want, building long-term relationships based on a foundation of trust and confidence.

Our firm is growing steadily, providing career opportunities. We work hard for our valued clients and have fun together. Our high attention to our clients is grounded in our values of client care first, honor, full reliability, going the extra mile, win-win teamwork, and diversity and inclusion. We are seeking a like-minded person to join our highly dedicated team.

Apply to Patti Matthews at patti.matthews@mranet.org.