



Accredited Investors

WEALTH MANAGEMENT

Client Service Associate

Accredited Investors Wealth Management® is currently seeking a Client Service Associate who is a quick learner with a high level of curiosity and a desire to contribute to a growing team. The ideal candidate has exceptional attention to detail, values a team-based collaborative working environment and culture, and is committed to building a long-term successful career within an independent advisory firm.

Primary Responsibilities

- Lead coordination and processing of new accounts, distributions, general maintenance, and movement of cash and assets
- Partner with team members to provide the highest-quality customer service to current and prospective clients
- Build trusted client, advisor and vendor relationships through a commitment to timeliness, accuracy, effective communication and an engaging interpersonal style
- Utilize CRM system for daily tasks, tracking and documentation of client data, and internal updates to current assigned work.
- Respond to daily communications from clients regarding account maintenance and other intra-day account servicing responsibilities
- Collaborate with Wealth Managers regarding account questions, service requests and all other matters
- Manage private investment enrollment with clients and investment companies including required client information, paperwork, and timeline for capital commitments
- Provide back-up and support to other Client Service team members, delegating work when necessary
- Participate in special projects or assignments as needed working with partners to solve complex issues that may arise.
- Work with client teams to facilitate the onboarding process for new clients

Required Knowledge, Skills and Abilities

- Exceptional oral, written, and interpersonal communication skills
- Excellent organizational and time management skills with consistent follow-through
- Ability to prioritize multiple tasks at one time in a fast-paced environment
- Strong technology skills and adaptability to new systems
- Resourcefulness and ability to independently resolve questions and issues
- Pleasant, professional, and positive demeanor
- Flexibility in an environment of complexity and change
- Unwavering ethics and commitment to "doing the right thing"

Education and Experience

- High school diploma or GED required, associates or bachelor's degree preferred
- 2+ years of professional experience
- Proficient in Microsoft Office, including Word, Excel, Outlook and PowerPoint
- Motivated, team-oriented and committed to providing a superior level of client service
- Self-disciplined with commitment to quality, attention to detail and accuracy

Experience Accredited

Accredited Investors Wealth Management®, based in Edina, Minnesota, is a fee-only comprehensive Wealth Management firm. We serve high net worth clients using an individualized service model. Our clients value our strong level of attention to detail, responsiveness to their needs and professional style.

As a firm, in addition to serving our clients, we are engaged in community outreach and various green initiatives. Our employees enjoy a beautifully appointed facility, including a fitness center, state-of-the-art technology, and amenities that enhance our work environment. Our Service From Anywhere (SFA) policy provides team members with the flexibility to incorporate remote work into their schedules, while maintaining our dedication to serving Accredited's clients. Development and training of our firm's talent is a top priority.

Accredited Investors Wealth Management® offers a competitive compensation and benefits package including medical; dental; disability coverage; a 401k plan with a generous employer match; life insurance; a marketplace-leading time-off allowance, including paid parental leave and paid volunteer time; and firm-wide profit sharing. Accredited was named one of the Top 150 Workplaces in Minnesota by the Star Tribune in 2020.

Accredited is committed to promoting diversity and inclusion in our hiring process and is proud to be an equal opportunity employer. We welcome qualified applicants without regard to race, color, religion, sex (including pregnancy, sexual orientation and gender identity or expression), national origin, genetics, disability, age, veteran status, and any other characteristic protected by federal, state or local laws.

For more information about our firm, please visit our website at accredited.com.

Please direct your cover letter and resume with salary requirements to resumes@accredited.com.