MARKS GROUP
WEALTH MANAGEMENT

# Client Service Associate

Marks Group Wealth Management is a Minnetonka-based Registered Investment Advisor with $1.5 bil AUM as of March 2021. The firm is growing rapidly through new client acquisition. There are presently twelve full-time employees.

We seek a career-oriented individual that can thrive in a collaborative environment and enjoys the challenges of providing exceptional service to our clients. Duties are varied and can include: preparation for client review meetings; meeting follow up; responding to client inquiries and maintaining and updating client files.

Core Responsibilities:

- Provide administrative and operational support to the firm's advisors
- Respond to client requests in a timely and professional manner.
- Participate in essential office duties, such as answering and routing phones, responding to emails, and scheduling.

Required Skills:

- Detail-oriented and organized
- Excellent interpersonal, verbal, and written communication skills
- Ability to prioritize and complete tasks efficiently
- Self-motivated and focused
- Proficient in Microsoft Word, Excel, PowerPoint, and Outlook
- Process oriented and can work in a collaborative environment

Education and Experience:

- Bachelor's degree preferred
- Minimum 3 years industry experience

How to Apply:

- Please send your resume to Erica.lewerenz@marksgroup.com. No calls please.