Client Services Professional

Arax Advisory Partners Cleveland, Ohio, United States (On-site)

Overview:

The Client Service Associate (CSA) provides dedicated support to their assigned financial advisors so that all operational and administrative aspects of a client relationship are handled seamlessly and with proper communication and documentation. The purpose of the CSA role is to free up the Financial Advisors to focus on providing advice and engaging in marketing/sales activities to retain and bring in new business. CSA's themselves do not have sales goals but are encouraged to communicate with their assigned financial advisors about potential new opportunities with existing clients. CSA's may also perform Paraplanner duties related to financial planning under the guidance of the Client Advisors. **This is an on-site, full-time role** in downtown Cleveland.

- Open and close accounts, facilitate money movement and security trades with Operations department, and work directly with clients to complete these tasks.
- Daily regular communication with advisors and clients, both virtually and in person as needed.
- Attend client meetings (in person and virtual) as requested by Client Advisors and assume primary responsibility for taking and recording notes and creating all follow-up tasks in CRM. Ensure all follow up tasks are documented and completed.
- Research complex situations, set client expectations, and define the actions necessary, to resolve inquiries promptly.
- Communicate and coordinate with internal departments and client's external advisors (accountant, attorney, insurance agent, etc.) to ensure client's expectations for timely service delivery are met.
- Active and regular CRM management (Advyzon) – ensure that all client communication, tasks and follow up items are properly documented and updated. Manage "task manager" by entering tasks, monitoring progress, and troubleshooting delays. Assist Financial Advisors as needed by documenting their client activities and notes into the CRM.
- Assist Financial Advisors in preparing for upcoming client meetings (i.e., paperwork, reports, presentations, etc.). Provide Client Advisors with notes as requested, to prepare for client discussions.

- Paraplanner duties include mastery of financial planning software (eMoney), data input and reporting for review by the financial advisor.

Qualifications

- Excellent communication skills, both written and verbal.
- Professional demeanor, appearance and discretion.
- Ability to work in a fast-paced environment and manage multiple tasks.
- Strong service orientation and strong attention to detail, follow up and organizational skills.
- Bachelor’s degree in Financial Planning, Finance, Marketing, Business or related field.
- CFP or Paraplanner designation a plus.
- 3+ years of experience in the financial services/banking/related industry.

Salary Range $65,000-$80,000/year

To apply please send a cover letter and a resumé to hr@araxpartners.com