Financialfreedom™
WEALTH MANAGEMENT GROUP, LLC

Client Services Associate

Description:

Our team is actively seeking a **Client Services Associate** for our Newport office. Our firm is comprised of fun, compassionate, community-minded individuals who love being part of a diverse and energetic team. A successful candidate must embody our values of treating all people with respect, never compromising our integrity, delighting our clients, and embracing our team culture. The ideal candidate must also be devoted to our commitment to care deeply about our clients and their financial lives.

Responsibilities & Activities:

- Support Wealth Advisor(s) in ways that provide service to current and future clients
- Plan and prepare for client appointments, helping multiple Wealth Advisors across multiple locations
- Assist with appointment scheduling and follow-up tasks
- Continue and maintain up-to-date knowledge and training on all programs used for financial planning and research
- Participate in client appointments, prepare/track account paperwork, and ensure a seamless onboarding process for new clients
- Build and foster stronger relationships with existing client base
- Manage client concerns and requests

Required Knowledge, Skills & Abilities:

- Minimum 1 year of clerical/administrative experience
- Minimum 1 year of customer service experience
- Excellent organizational, time management, and detail-oriented skills
- Able to handle multiple tasks
- Excellent interpersonal and communication (oral & written) skills
- Proficient with computers

Benefits include:

- 100% Medical and Vision premium coverage
- Voluntary Dental benefit
- Paid time off
- 10 paid holidays
- Paid sick leave
- 16 hours of paid volunteer time
- Paid maternity and other parent leave options
- Annual bonus plan
- Short-term and long-term disability*
- Life insurance*
- 401k plan*
- Cell phone reimbursement
- Cappuccinos for life!

*Eligible after one year of employment