Client Service Administrator (CSA) – Part- or Full Time

The Role

The Client Service Administrator is responsible for managing client relationships, playing a key role in defining the overall client experience. Additionally, the CSA supports the principal and advisors as an office administrator. This role has a flexible location and can include working from home several days a week.

Duties

Client management:

- Respond to client inquiries within set time using appropriate tone and adhering to compliance requirements.
- Work with advisor to schedule client meetings; prepare and provide supporting reports to advisor before meeting; after meeting, review and document meeting with advisor.
- Track, manage, and maintain all client records, both electronic and physical, leveraging Client Relationship Management (CRM) software to continually enhance procedures.
- Complete custodian forms; monitor and resolve issues with custodian.

Support advisors:

- Serve as first point of contact for third parties.
- Manage all aspects of firm marketing, including preparing newsletters, updating blog and website, and branding.
- Perform office administrator tasks including coordination of calendars and running meetings.
- Become firm expert on technology, providing training and support to advisors.
- Manage firm hardware and software.

Skills and Experience

Required

- At least 12 months' experience in financial industry
- Proficient at Microsoft Office and Adobe Acrobat
- Experience with CRM systems
- Superior technology skills coupled with ability to learn new software quickly and comprehensively

Preferred

- Experience working with Charles Schwab
- Experience with Tamarac products, including CRM, Advisor View, and Portfolio Center
- Experience with MoneyGuidePro
- Series 65 license (or willing to obtain)

The ideal candidate will possess excellent verbal and written communication skills and pay meticulous attention to detail, applying prior experience in financial industry and sharp technological acumen to quickly master Kaizen's processes and software. Driven by a passion for providing excellent client service, the candidate will work both independently and collaboratively with advisors. The candidate's professionalism will reflect his/her work ethic, high level of integrity, and regard for confidentiality.

About Our Firm

Kaizen Financial Advisors, LLC, is a successful wealth management firm focused on helping clients navigate complexities in life—financial or otherwise. We offer a broad range of wealth management and financial planning services to clients in the high net-worth space, with an emphasis on providing excellent service based on our deep client relationships.

Join our growing and prosperous business and work with a friendly, collaborative team to provide a superior client experience.

If you believe you meet the criteria and align with the values of our firm, please forward your cover letter and resume to:

Laurie Klein, Principal, CFP, ChFC
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www.KaizenFA.com