Client Service Associate Job Posting

Avier Wealth Advisors provides comprehensive financial planning and investment advisory services on a fee-only basis to individual investors, families and business owners. Committed to absolute transparency, we build enduring partnerships with our clients based on mutual trust, shared values and sound investment strategies.

At Avier, every client is supported by a three member advisory team; Lead Advisor, Associate Advisor, and Client Service Associate. Together, we work with families to build a customized financial plan and accompanying investment strategy to help support short-term and long-term financial goals.

We pride ourselves on a culture of education, which is reflected in our level of highly credentialed staff. We have 4 CFP® professionals, 4 CFA® charterholders, and 1 CPA.

Avier Wealth Advisors is looking to add a Client Service Associate to our team. We are searching for someone who is detail-oriented and hard-working, with strong customer service and communication skills. You must have the ability to work efficiently while taking on multiple projects at once. A positive attitude, team-oriented mentality, and a passion for the financial industry is a must, with the goal of becoming a Lead Financial Advisor.

QUALIFICATIONS

- Strong communication skills, both written and verbal
- Familiarity with investment and financial concepts
- Ability to manage your time well with limited supervision
- Detail oriented with the ability to work on multiple projects at once
- Strong computer and Microsoft Office skills – specifically Excel
- Positive attitude with a desire to help others

RESPONSIBILITES

- Work alongside advisory team members to help deliver financial planning services
- Prepare paperwork and reports for current and new clients as requested by the Lead or Associate Advisor
- Gather, organize and input client and prospect data into Salesforce
- Handle daily distributions and contributions
- Oversee, electronic filing and ongoing maintenance of client paperwork stored on the company's server
- Prepare mailings for client paperwork, holiday cards, and marketing material
- Send email blasts regarding webinars, upcoming events, and special notices
- Manage all incoming phone calls and direct callers to appropriate colleagues
- Manage inventories of the office, kitchen, and marketing supplies

EXPERIENCE

- Bachelor's degree in Finance / similar field preferred or equivalent work experience

- Minimum of 1 year related experience in financial services
- Experience with Salesforce, TD Ameritrade, MoneyGuidePro is preferred but not required

This is a fulltime position. Compensation depends on experience.

Please send your resume, along with a cover letter that allows us to get to know you, to carly@avieradvisors.com // subject line: Avier Client Service Associate