To apply, please submit (1) cover letter and (2) resume to Stacey Stuchal at sstuchal@truewealthdesign.com.

Client Service Administrator Job Description

True Wealth Design is a rapidly growing wealth management firm in Akron, OH (near Summit Mall), recognized in Crain's Cleveland Top 25 Financial Planners' List, and is seeking a Client Service Administrator (CSA) for our expanding team. This is a great opportunity for friendly, optimistic, and detail-oriented candidate with minimum 2+ years of financial services experience to thrive in an administrative and operational role.

Candidates that fit into our firm and culture will desire to be in a small firm environment and have a true passion for managing details and helping people as their career calling. We work hard, get things done on time, have high expectations of all team members, pay close attention to details, but are not too formal and like to have fun. We want only the highest quality people for each position and will provide excellent compensation and rewards meaningful to each employee in return for their superior performance.

Position Overview

This is a full-time, non-salaried position that will support a team-based approach to client service in conjunction with a Lead Advisor and Support Advisor in directly managing existing and new client relationships. Standard hours are 40 hours per week during normal business hours. From time to time, this position may require time outside of standard hours.

On a daily basis, you will handle requests from advisors and clients and effectively use your passion, our technology, and processes to provide a consistently exceptional client service. You will also be expected to help innovate and improve our operational systems, workflows, and procedures. A strong candidate may grow in responsibility and contribute to operational leadership of the firm.

Initial Key Areas of Responsibility:

- Processing investment account paperwork and tracking ACHs, transfers, contributions, distributions, etc.
- Performing account maintenance and running/posting reports within portfolio management system and client vault
- Problem solve directly with custodian (Shareholder Services Group / Pershing)
- Running insurance quotes and illustrations, plus processing of policy applications and other policy service items
- Provide administrative support including managing calendars, handling phone calls, and managing documents
- Responding to client and advisor service requests
- Handle phone, email and written communication with clients in a professional manner
- Utilize our CRM and Document Management System for documentation and tracking of client data, tasks, accounts, and policies

Key Qualifications:

- Minimum of 2+ years in financial services, preferably with RIA
- Custodian experience, preferably with Pershing and NetX 360 (Schwab, Fidelity, or TD Ameritrade also helpful)
- Experience with life insurance application processing and policy service
- Position requires a bright, self-motivated, and personable individual with strong verbal and written communication skills
- Must thoroughly enjoy and excel at highly detail-oriented work and be able to follow-through on assigned tasks and responsibilities

- Able to work independently with a ‘no job is beneath me’ attitude
- Above average knowledge of Microsoft Office suite, specifically Word, Excel, Outlook, and PowerPoint
- Experience with industry technology: CRM (preferably Redtail but Junxure/others helpful) and document management systems (preferably Net Documents but Worldox, Docupace, and others helpful)
- Experience with form preparation via LaserApp
- Experience with portfolio management systems, preferably Morningstar Office (Tamarac, Orion, Black Diamond also helpful)
- Securities licenses helpful
- Two-year or four-year degree preferred but not required for otherwise strong candidate

Benefits:

- Highly competitive hourly compensation
- Company subsidized health, dental, and disability insurance
- 401k plan with company match of 100% up to 4% of compensation
- Generous Paid Time Off allowance
- Educational reimbursement for continuing education, training, etc.