Salem, VA - Client Services Associate

About Us

Founded in 2009, Partners in Financial Planning is located in Salem, Virginia and Charleston, SC, serving clients locally and across the country. Our dedicated staff is passionate about what we do and the services we provide. Specializing in tax-focused, comprehensive, fee-only financial planning and investment management services, Partners in Financial Planning provides high touch services designed to exceed our client's expectations.

Job Description

Our Salem, Virginia office is looking to expand our operations team with a full-time Client Services Associate. The Operations Team serves Partners in Financial Planning clients and advisors by providing support in areas such as: account administration, application and forms completion, tax preparation support, and other operational duties.

Remote/Hybrid Work Policy: This is an on-site position at our Salem, Virginia office. Remote work is not available for this position at this time.

Specific duties include:

- Facilitate the completion of various custodian forms.
- Work directly with clients (in-person, over the phone, or via email) and advisors to execute account activities, resolve form issues, and answer questions.
- Provide back-up front-desk general administrative duties such as: answering the phone, sending and retrieving mail and other mail carrier services, and a first point-of-contact greeting.
- Utilize the client relationship management (CRM) system to maintain accurate documentation, complete tasks, and other client or firm related activities.
- Review and document process changes.
- Scan, download, and file documents as needed.
- Execute cash management such as sending and receiving funds.
- Provide mentorship to less experienced associates.
- Serve as a subject matter expert within the firm in regards to operations processes.
- Ability to support at least 125 retainer client relationships.
- Research new processes and applications/forms to execute a proper action plan and incorporate new processes into our workflows.
- Proactively identify and resolve problems.

Qualifications

Required:

- High school diploma.
- Ability to pass a credit check and criminal background check.
- Proficiency in Microsoft Office, specifically Word and Excel.

- Ability to learn and utilize industry specific applications such as: Advisor Engine CRM (formerly Junxure), Net Documents, and custodian platforms such as TD Ameritrade, Charles Schwab, and Fidelity in their daily tasking.
- Accurate and detail oriented, specifically with the completion of applications and forms.
- Ability to multi-task and handle many competing priorities.
- Exceptional customer service to include the ability to communicate clear explanations, plan of action, and status updates.
- Ability to work independently with minimal guidance from others.
- Experience in the completion of applications or forms in an office setting.

Preferred:

- B.A. or B.S.
- Experience with Advisor Engine CRM (formerly Junxure), Net Documents, and DocuSign.
- Experience in the completion of applications or forms specific to the financial industry. Previous experience with TD Ameritrade, Charles Schwab, or Fidelity is ideal.
- Financial and/or office administration experience.

The Perks

- Salary based on experience and qualifications with a range of $40,000 to $55,000
- Available health insurance with a premium stipend above the base salary to help offset the cost.
- Available life insurance, short-term and long-term disability through a professional association with a premium stipend to cover the majority of the cost.
- Annual bonus and profit-sharing opportunities.
- Continuing Education stipend.
- Paid Time Off (PTO) and observed holidays.
- 401(k) plan with match.
- Half day Fridays during the summer months.
- Team focused collaborative work environment.

Interested?

Please email your resume with cover letter and salary requirements to chris@partnersinfinancialplanning.com or mail to: Chris Bishop, Partners in Financial Planning, 421 S. College Avenue, Salem, VA 24153. **Or Apply here:** indeed

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