Client Service Associate

Bogart Wealth
McLean - VA (United States)
Job

We are looking for a Client Services team member who is excited at the prospect of contributing to the growth and success of our business. If your goal is to work in the financial services industry and you are looking for career development opportunities, we would like to talk to you.

Initial Key Areas of Responsibilities:

- Handle requests from Clients and business partners pertaining to account administration
- Assist with the preparation of account paperwork and check pending account maintenance items
- Maintain prospect and current client information in all existing databases (CRM)
- Maintain calendars for financial advisors
- Organize, scan, and maintain all paper/electronic Client Files
- Assist with the marketing and business development
- Oversee the maintenance of the Houston Branches
- Continually evaluate day to day activities for process improvement opportunities
- Develop Key Objectives and manage all assigned projects/tasks to achieve Key Objectives in a timely manner

Key Qualifications:

- A bachelor's degree or equivalent financial services industry experience required
- Excellent customer service skills
- Must be detail oriented and have great organizational skills
- Must be able to work independently and as a team player
- Empathy and great active listening skills
- The ability to think clearly, communicate succinctly, and write well
- A strong team orientation. A willingness to help other team members grow
- Problem solver
- Intermediate to advanced knowledge of Microsoft office

Benefits:

- Competitive compensation depending on experience
- A bonus program based on individual performance and company success
- A 401 (k) retirement plan
- Medical, Dental and Vision benefits
- Designation expense reimbursement
- A fun and friendly team of colleagues

To Apply:

https://bogartwealth.com/client-service-associate/