THE ADVOCATE GROUP

Position Description

Title: Client Service Associate
Benefits: Yes
Location: Minnetonka, MN
Status: Full time

About The Advocate Group

The Advocate Group provides financial planning and investment management services. We specialize in navigating the unique financial opportunities and challenges facing executives and their families from some of Minnesota's most prominent companies. Our planning-centric process informs our ability to help coordinate complex cash flow, estate, charitable, tax and investment needs on behalf of our clients. Website: www.theadvocategroup.com.

Job Summary

The Client Service Associate (CSA) is a critical part of The Advocate Group team, responsible for delivering extraordinary client service and care. As one of the first people clients connect with, the CSA is instrumental in making sure clients have a positive experience that exceeds their expectations. If you love building relationships, connecting with clients, managing a diversity of tasks, have a strong attention to detail, and want to be an important part of a growing team, then this opportunity is for you. The successful associate will be professional, caring, and genuinely demonstrate the highest level of client service while providing operational and administrative support.

Responsibilities

- Manage and resolve client service requests.
- Answer phones, distribute and process mail and assist with scheduling.
- New account set up and account maintenance.
- Administer account transfers, contributions, and withdrawals.
- Maintain client records (database, electronic and physical files, other platform tools).
- Data gathering, data entry
- Prepare for in person client meetings
- Maintain and update existing tools and processes.
- Partner with Financial Planning and Investment teams.
- Monthly client billing.
- Other responsibilities as assigned.

Qualifications

- High school diploma required; bachelor's degree preferred
- Financial services experience or applicable internship experience a plus
- Excellent client service and relationship management skills
- Strong attention to detail and accuracy
- Professional presence and communication skills
- Ability to think critically
- Self-motivated and able to prioritize work
- High energy and desire/ability to work successfully in a fast-moving, small company environment
- Flexible and adaptable, must respond well to ongoing changes of a growing and evolving firm
- Experience working with a CRM, eMoney, Charles Schwab, Fidelity a plus
- You will be required to comply with a Code of Ethics which covers personal trading activities for you and members of your household.

Salary and Benefits

- Salary will be commensurate with experience
- Bonus based on company performance targets
- Benefits include 401(k), health care, dental, health savings account, continuing education

Contact Information

Please send a cover letter and resume to: information@theadvocategroup.com

The Advocate Group, LLC is an Equal Opportunity Employer