THE ADVOCATE GROUP

Position Description

Title: Client Service Associate

Reports to: Client Service Manager

Benefits: Yes

Location: Minnetonka, MN

Status: Full time

About The Advocate Group

The Advocate Group is a planning-centric wealth management firm that provides financial planning and investment management services. We specialize in helping executives and their families navigate complex financial opportunities and challenges associated with leadership positions at some of Minnesota's most prominent companies. Our integrated approach combines detailed financial planning, investment management, tax coordination, estate planning, charitable strategies, and cash flow management to help clients make confident financial decisions and achieve long-term success.

Our culture is built on collaboration, intellectual curiosity, innovation, and a commitment to excellence. We seek team members who are energized by solving complex planning challenges, continuously improving processes, and helping both clients and colleagues thrive.

Position 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 with whom clients connect, 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 files, and other platform tools.
- Partner with Financial Planning and Investment teams.

Success Includes

- Consistent, high quality, and timely client service deliverables.
- Strong client satisfaction and exceptional client service outcomes.

Qualifications

- High school diploma required; bachelor's degree preferred.
- Financial services experience or applicable internship experience preferred.
- 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 Salesforce, 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.

Why Join The Advocate Group

- The Advocate Group offers a highly collaborative environment that values innovation, professional development, and advancement within the firm.
- This position provides a meaningful support role that makes a lasting impact on both clients and colleagues.

Salary and Benefits

- Salary will be commensurate with experience.
- Bonus based on company and individual performance targets.
- Benefits include 401(k), health care, dental, health savings account, paid time off, continuing education, and equity ownership.

Application Information

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

The Advocate Group, LLC is an Equal Opportunity Employer