AVIER
WEALTH ADVISORS

CLIENT SERVICE ASSOCIATE

Bellevue, WA

Client Service | Full-time

Avier is one of Bellevue's fastest growing financial advisory firms and we are looking to hire a Client Service Associate. Avier is committed to providing exceptional service to our clients and fostering a culture that values teamwork, honesty, and a desire to build deep relationships with our clients and one another. We truly enjoy the work we do and the people we get to work with. We believe in a healthy work life balance and we collaborate with team members to make sure work is accomplished. Avier focuses on the tech community and how to help local tech employees maximize the benefits available to them through their work.

We pride ourselves on a culture of education, which is reflected in our highly credentialed staff. We have 8 CFP® professionals, 4 CFA Charterholders, 2 MBAs and 1 Enrolled Agent.

Client Service Associates are a critical component of the client advisory team. Each client has a 3-person advisory team that consists of a Lead Advisor, an Associate Advisor, and a Client Service Associate (CSA). The CSA helps ensure a great client experience and works with the Lead Advisor and Associate Advisor to make sure that all parts of the clients' financial life are addressed.

CLIENT SERVICE ASSOCIATE ROLE

- Entry Level position that is looking to become an Associate Advisor in 1-3 years depending on experience.
- Works with the Associate Advisor to achieve timely execution of requests within time frames such as trades, wire requests and journals; initiates these requests and is responsible for confirming them with the Associate Advisor; ensures completion within specified time frames.
- Help process paperwork and onboard new clients in conjunction with the Lead Advisor and Associate Advisor.
- Work alongside advisory team members to help deliver financial planning services
- Prepares paperwork and reports for current and new clients as requested by the Lead or Associate Advisor
- Gather, organize and input client and prospect data into Salesforce
- Handle daily distributions and contributions
- Oversee electronic filing and ongoing maintenance of client paperwork stored on the company's server
- Prepare mailings for client paperwork, holiday cards, and marketing material
- Manage incoming phone calls and direct callers to appropriate colleagues

CANDIDATE EXPERIENCE

- 0-4 years of experience in a financial planning within wealth management or a related industry; expected to be current with industry trends, terminology and concepts
- Major in Financial Planning, Finance, or Economics a plus
- Progress towards or interest in the Certified Financial Planner (CFP®) designation
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint) and expected to learn other position-related systems on the job
- Good time management ability in order to handle multiple client relationship requests and contending priorities from other team members. Uses team member resources effectively.
- Knowledge of the following programs is a plus: Fidelity Wealthscape, Schwab, Salesforce, Orion, MoneyGuidePro

COMPENSATION

Avier provides competitive compensation as well as other benefits. The Client Service Associate position receives:

- Competitive Salary ($50,000 to $70,000 DOE)
- Firm Bonus based on profitability
- 401(k) match
- Insurance coverage and employer HSA contributions
- Flexible work schedules
- Paid Time Off
- Education Reimbursement

Candidate Compensation will vary by experience and is competitive with industry averages.

Please submit Resume and Cover Letter to:
Info@avieradvisors.com

AVIER WEALTH ADVISORS
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