Lead Service Advisor

Bellevue

Client Service

Full-time

Avier is one of Bellevue’s fastest growing financial advisory firms and we are looking to hire a Lead Service Advisor. Avier focuses on the tech community and helps tech employees maximize the benefits available to them through their work. We also provide financial planning for retirees who have finished their careers. We pride ourselves on delivering best-in-class service to our clients while celebrating team wins and having fun along the way. We’re both dedicated to our client’s success, and dedicated to helping one another succeed and grow professionally. We believe in a work life balance, and we collaborate with team members to make sure work is accomplished.

Lead Service Advisors are a critical component of the client advisory team and are tasked with delivering a best-in-class financial planning and investment management experience to all of the clients they work with.

Lead Service Advisor Role:

- Acts as main point of contact for clients.
- Maintains existing client relationships, and is responsible for day-to-day financial planning, tax planning, account maintenance, investment management decisions, and account activity.
- Runs client meetings and presents ideas and concepts in an organized and effective manner; ensures all client related action items are communicated and memorialized in the CRM, and is meticulous about follow-up and next steps.
- Maintains notes on clients and updates Salesforce (CRM). Updates MoneyGuidePro financial plan information and ensures accuracy. Works within a variety of planning tools and software to make sure that the information correctly reflects the client’s situation.
- Creates client meeting agenda and determines other deliverables to be presented, analyzes client data and develops strategies; works independently (with the support of the team whenever necessary) to support client needs and develop financial planning goals/strategies.
- Reviews client allocation for adherence to Risk Tolerance and Strategic Asset Allocation. Coordinates with the Director of Portfolio Management to implement trades and allocation changes.
- Is well versed and competent when it comes to retirement income planning, Social Security, Required Minimum Distributions, tax-bracket optimization, Roth

conversions, estate planning needs, and recognizing opportunities to reduce taxes.

- Coordinates with outside tax professionals and estate planning Attorneys. Directs change in client accounts as necessary from outside resources.
- Works with the Client Service Associate to achieve timely execution of requests such as new account implementation paperwork, distribution requests, trades, wire requests and journals; initiates these requests and is responsible for reviewing and approving them; ensures completion within specified time frames.

Candidate Experience:

- Five+ years of experience in financial planning preferred within wealth management or a related industry; expected to be current with industry trends, terminology and concepts
- Certified Financial Planner (CFP®) designation
- Proficiency in Microsoft Office Suite (Word, Excel, Powerpoint) and expected to learn other position-related systems on the job
- Great time management skills and ability to handle multiple client relationship requests and contending priorities. Uses team member resources effectively.
- Knowledge of the following programs is a plus: Fidelity, Schwab, Salesforce, Orion, and MoneyGuidePro

Compensation:

Avier provides competitive compensation across a variety of different areas. Employees receive in compensation and benefits:

- Remote work
- 401k match
- Insurance coverage with employer HSA contributions
- Flexible working 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