Lead Service Advisor

Bellevue

Client Service

Full-time

At Avier, we strive to change the financial trajectory of people's lives one financial decision at a time. We are one of the fastest growing financial advisory firms in the Pacific Northwest and we are looking to hire a Lead Service Advisor. We believe in a work life balance, and we collaborate with team members to make sure work is accomplished.

Lead Service Advisors primarily work with retirees and existing clients. Their focus is on serving clients, business development is not a focus of this position. They work with the client advisory team and are tasked with delivering stellar 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.
- Owns 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 Portfolio Management to implement trades and allocation changes.
- Is well versed 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: Schwab, Fidelity Wealthscape, Salesforce, Orion, MoneyGuidePro

Compensation:

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

- Salary Range of $130,000 - $150,000 (DOE)
- Potential for bonus
- 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 Nick.Hartford@avieradvisors.com