

CLIENT SERVICES ASSOCIATE

The Chamberlin Group (Des Peres, MO), an established and growing Tax and Financial Consulting company, has an **immediate, full-time position** for a Client Services Associate. You will be working with a ***helpful, professional, and engaging*** team of people.



ABOUT OUR COMPANY

The Chamberlin Group was founded in 2002, bringing 30+ years of tax and financial experience to our community. Among others, we serve people who are of retirement age and are transitioning from working to retirement. We help clients with their tax planning, investment advice, and holistic financial planning. Our firm continues to grow, and we are sought after because we set our clients at ease with a friendly atmosphere and treat them as our highest priority.

ABOUT THE JOB - KEY RESPONSIBILITIES:

- Provide exceptional customer service to our financial clients
- Administrative and operational support to our Financial Advisor Team
- Develop relationships with insurance partners & asset managers
- Onboard new accounts through Firelight & Fusion Applications
- Follow up on new accounts while building relationships with clients
- Update spreadsheets for Financial Advisors
- Proactively participate in firm initiatives directed by our leadership team
- Schedule and reschedule client meetings for Financial Planner team
- Manage and coordinate our hiring and recruiting efforts
- Responsible for understanding firm policies, procedures, and digital capabilities
- Become familiar with and understand our marketing process & educational classes
- Organize and maintain client files with strict confidentiality
- Respect and support leadership, marketing, financial, and administrative teams

REQUIREMENTS

- Financial Industry experience 2-4 years preferred
- College degree preferred but not required

TRAITS NECESSARY FOR SUCCESS

- Strong computer skills, knowledge of Microsoft Office and G-Suite
- Familiar with managing clients in a CRM database
- Exceptional interpersonal, client service, and conflict resolution skills
- Strong written and verbal communication
- Team player with the ability to collaborate with others and work independently
- Ability to work in a fast-paced, evolving environment

SCHEDULE

- 8:30am-5:00pm Monday through Friday

COMPENSATION

- \$38,000-\$40,000
- PTO
- 401(k)

You must communicate effectively in all areas of the business to ensure excellent service is provided to our clients. It's important that the person we choose is a fit with our commitments and shared values. We would love to have you join our fun, family-oriented team! Visit us at www.chamberlin-group.com.

TO APPLY:

Please follow the link:

<https://j.brt.mv/SearchPublicRequirements.do?searchTerms=27559792&location=&companyGK=18679&portalGK=9134>