Vision Financial Planning: Client Service Associate

Are you interested in working in the financial services industry?

If you want to make a difference in the lives of others, we may have the right opportunity for you. We are looking for a Client Service Associate who is passionately committed to helping others. In this dynamic position, you will help us make our interactions with clients unique and memorable.

You're the Client Service Associate we're looking for if…

You will be the face and voice of the firm, making a lasting, positive impression. You are a bright professional who is committed to providing outstanding client service. You are organized, detail-oriented and enjoy anticipating others' needs and jumping in to help them. You are computer savvy and enjoy assisting clients and providing exceptional service.

Who We Are

We are the Personal CFO to successful female entrepreneurs and professionals who are in transition. Whether they are experiencing accelerated business growth, getting an inheritance, receiving stock options, getting ready for retirement, or loss of loved ones, going through divorce, we are here to guide our clients and give them the confidence to pursue their dream and truly live a life of significance. We are located in downtown Berkeley and offer a comfortable, professional, work environment. Room for advancement.

Qualifications

You must have five years of administrative or client service experience in a professional environment, preferably in the Financial Services industry. We believe in working hard for our clients so a strong work ethic is required. The ideal candidate is client-centric, positive, dependable, well-organized and eager to learn new skills. The position requires excellent interpersonal skills and phone demeanor, the ability to deliver exceptional client service and a genuine interest in helping people. Attention to detail and accuracy in work is of utmost importance. Must have proactive approach and excellent follow-through. Ability to handle multiple tasks efficiently while managing workload and meeting deadlines.

Responsibilities include:

- Handle incoming calls and emails from clients and others; provide warm and professional greeting and care to clients, prospects, and other visitors to the office;
- Handle new business and servicing of existing business including accurate paperwork preparation and processing, attention to detail, proactivity in meeting client needs;
- Use excellent client service skills to build and strengthen client relationships and rapport; provide exemplary and proactive support and service to clients and prospects as needed
- Maintain advisor calendar, schedule and plan client and prospect meetings; follow up on action steps and service items from advisor meetings; creating accurate and detailed tasks ensure appropriate follow through to completion
- Accurately create and maintain client files and database records; develop and maintain written systems of all activities
- Coordinates marketing pieces and events as necessary
- Provide comprehensive administrative support to all staff as needed

Please email your resume with cover letter explaining why you would be a good fit for this position and salary requirements to Lan Shaw, care@visionfinancialplanning.com

Please, no phone calls.