Client Service Administrator Career Opportunity

WealthPoint Advisors

WealthPoint Advisors provides fee-only wealth management and financial planning services to high net-worth individuals, retirement plans, corporations, and non-profit organizations.

Located in Indianapolis, IN (Castleton), we are looking to add a proven, committed, and driven individual to our growing firm.

Position Description

The Client Service Administrator (CSA) is responsible for delivering a superior client experience. The CSA also plays a key role in ensuring the operations and the administration of the office run smoothly. This role works closely with advisors and clients and will frequently communicate with both. The CSA will also work with third parties (custodian and other vendors) and perform other tasks and problem-solving as needed.

Duties and Responsibilities

- Deliver superior client service – prepare, submit, and follow up on processing paperwork, resolve inquiries and escalate cases when appropriate, troubleshoot problems.
- Answer incoming client calls cordially and professionally.
- Present friendly and hospitable guest reception in the office.
- Perform or monitor front office functions – appearance, supplies, mail/shipping.
- Support advisors with administrative tasks which include maintaining electronic files and portfolio management systems and preparing for client meetings.
- Work directly with custodians to open and service accounts.
- Attend internal meetings and prepare meeting minutes.
- Attend custodian operations workshops to gain best practice procedures.
- Plan and execute special projects as needed.
- Assist in the planning and preparation of client events.
- Obtain/maintain notary designation.

Qualifications

- Bachelor's Degree from an accredited college or university
- 1-3 years of experience in the investment, finance, or accounting field preferred
- Proficient with technology, specifically Microsoft products; experience with portfolio management or client relationship management systems a plus
- Highly detail-oriented, accurate, organized, able to set priorities, diligent on follow through
- Excellent time management skills, ability to meet time deadlines and balance multiple responsibilities
- Strong written and verbal communication skills
- Self-starter, takes initiative, proactive, and resourceful
- Able and willing to learn new software with nominal help
- Team player, collaborative, able to work closely with others
- Desire/ability to work successfully in a small company environment; reliable and dependable

Salary and Benefits

Pay/benefits are competitive based on industry standards, experience, and capabilities.

Benefits may include: 401(k) with company matching program, paid vacation, paid holidays, and paid health insurance. Full financial support may be provided for professional accreditation/continuing education requirements and other education/ training opportunities.

For confidential consideration, please forward your resume to: pstephenson@wealthpointadv.com
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