

Client Services Representative – Learn, Grow, Contribute

We are a growing independent financial planning firm based in Vienna, VA that offers a fun environment, great benefits and the opportunity to help others.

Egan, Berger and Weiner, LLC is one of the leading financial planning firms in the area and is often featured in national media such as CNBC, the Wall Street Journal, USA Today and others. As an independent firm, we put our clients first.

We are looking for a Client Services Representative to support our clients and financial planners. The salary range is \$50,000 to \$55,000 per year.

We offer:

- Full benefits and a generous 401(k) match
- Excellent growth opportunity
- Bonus incentive plan
- Opportunity to learn and develop

Responsibilities Include:

- Delivering excellent client experiences
- Assisting Financial Planners in the planning process
- Developing reports for clients and planners
- Processing trades
- Managing planner schedules and calendars

The ideal candidate will have:

- A strong desire to help others reach their goals
- A Bachelor's Degree or higher
- Series 7 license preferred but not required
- Strong attention to detail
- Great communication skills

To learn more about our firm and the position please visit us at EBWLLC.com/careers