

**Position Description
for
Client Support Associate**

Oakwell Private Wealth Management is a boutique wealth management firm committed to providing our clients top-tier financial planning, business planning, and investment management services. Our approach is different than most firms. The industry is moving away from the old transactional model of broker-dealers and insurance agents toward RIAs and fiduciary advisors. Our success is achieved through a single-minded commitment to provide financial clarity and peace of mind for the clients we serve. We have a relaxed culture but hold every team member to high standards.

Our Client Support Associates directly impact the client experience and are vital to the success of our organization. The person in this role will be a member of a dynamic team in a collaborative, client-focused environment utilizing their exceptional organizational, communication, and problem-solving skills. The Client Support Associate supports the Client Advisor in servicing the needs of high-net worth clients. Our ideal candidate thrives in a fast-paced environment, has a willingness to learn, and wants to be challenged.

Essential Job Functions:

1. Provide support to the Advisor Teams by administering client data gathering and on-going service processes
2. Greet & assist clients on site
3. Reach out to clients via phone and/or email to schedule review appointments
4. Answer inbound telephone calls
5. Draft correspondence and other formal documents
6. Collect & prepare initial financial data for financial planning meetings
7. Provide general office support for the firm
8. Other duties as needed

TO SUCCEED AS AN OAKWELL CLIENT SUPPORT ASSOCIATE, THE FOLLOWING SKILLS ARE REQUIRED:

- Excellent verbal, written, analytical, and organizational skills
- Proficiency with MS Word, Excel, and Outlook
- Strong attention to detail
- Competency to prioritize and multi-task
- Ability to maintain confidentiality with all matters
- Enjoys being part of a team

PREFERRED QUALIFICATIONS OF THE SUCCESSFUL CANDIDATE ARE:

- Bachelor's degree from an accredited institution
- Customer service background
- Previous experience in office administration or other related fields
- Experience working with high-level, busy professionals

Working Conditions: Professional, internal office environment, daytime hours, standing, sitting, assigned to a work station, and no heavy lifting over 10 lbs. Business casual work attire is required. Initially, some travel to our New Braunfels office will be required; occasionally, local travel will be required (i.e., UPS, Post Office, etc.).

Job Type: Part-time; approximately 20-30 hours per week

Education: High School Diploma required; Bachelor's Degree preferred