Overview

About Crescendo Wealth Management:

Crescendo Wealth Management is a boutique, holistic financial planning firm based in Cedarburg, Wisconsin. It was founded in 2013 by Betty Wellhoefer Hill, CFP® (CERTIFIED FINANCIAL PLANNER) who spent her first 19 years as a Financial Advisor with Robert W. Baird and Co.

She launched Crescendo to deliver comprehensive financial planning which starts with advice and education. Betty has been recognized for 10 years in a row as a 5 Star Wealth Manager by Milwaukee Magazine and in 2022 by our broker dealer JW Cole Financial as the Firms Advisory-Advisor of the Year.

Crescendo offers an innovative approach to financial services utilizing co-planning and technology to enhance the client experience. Our client relationships always begin with a financial planning engagement to deliver consulting services first with investment management, insurance, and annuity solutions to follow as needed.

We have two core client specialties which include Retirement Income Planning for pre & post retirees and Special Needs Financial Planning for disabled individuals and their families.

About the Position:

Crescendo Wealth Management is seeking a Client Service Associate to join our team. This position plays a very important role because it serves as a liaison between our financial advisors and our clients. To excel at this position you should be professional, energetic, enthusiastic, growth-minded, a problem solver, good at time management, and interested in learning.

The ideal candidate for this position has experience executing a wide variety of operations related functions within a financial services organization. This includes but is not limited to all aspects of onboarding and servicing clients with their financial planning, investment, insurance, and annuity needs. This position will also work closely with the financial advisors assisting them with client meeting preparation and follow-up.

Our firm is a heavy user of financial technology to enhance the client experience and increase operational efficiencies. It is imperative that the candidate is comfortable with using, maintaining, and implementing our current and future technology.

Responsibilities:

- Manage Financial Advisor calendars
- Participate in client, prospect and COI meeting preparation and follow up
- Provide proactive solutions to automating services where possible

- Open investment accounts with multiple custodians and ensure all paperwork has been completed and transfers processed correctly
- Provide service for investment accounts including managing contributions, distributions, redemptions, service changes, beneficiary updates, RMDs.
- Complete insurance and annuity applications for new business, as well as servicing our existing contracts and policies
- Deliver exceptional client service
- Assist with marketing efforts to our clients, prospects, and centers of influence. Including our blog, monthly newsletter, and other forms of communication

Qualifications:

- Bachelor's degree in general business (preferably finance specifically)
- 3+ years of financial services experience
- Licensing within our industry preferred but not required
- Clear regulatory history and ability to pass a background check
- Excellent interpersonal skills, attitude, and an extraordinary client service orientation
- Self-starter who is willing to take on new challenges, adapt to change and can succeed in a self-directed manner
- Attention to detail and exceptional organizational skills with ability to multitask and meet deadlines
- Preference for experience with Excel, Word, Outlook, RedTail, eMoney, Calendly, Zoom, Holistiplan, as well as willingness to learn technology
- A genuine interest in learning, growing, engaging, serving, and caring for other people

Compensation & Perks:

- This is a Full time W2 position
- Located at Crescendo Wealth Management office in Cedarburg, Wisconsin
- $40K-$50K compensation range, depending on experience, with potential bonuses
- Vision, dental, life and disability insurance included.
- NYSE Holidays (10 in 2023) as paid vacation
- 10 PTO days for vacation and illness
- Valuable mentorship and learning opportunities with Financial Advisors who have combined 30 + years in the business.
- Allowance for additional licensing and continuing education
- Ability to grow into other positions within the Firm.

Next Steps:

- In addition to your resume, send a few sentences about why you would be interested in working with our firm.
- Send all correspondence to info@crescendowm.com