

We realize that the title “Client Service Associate” (or “CSA” as we call it internally) is pretty vague. The CSA works with the Financial Advisor to provide an excellent experience for our clients. Your job is to make our clients feel cared for, and to solve their problems. To do this job well, you need to be comfortable solving problems without clear guidance (i.e. catching curveballs) and treating your clients like you treat your loved ones.

That's the high-level description, but you probably want to hear more about the details:..

How to Succeed

Successful CSAs at Abacus...

- Process new client account paperwork quickly and with as little disruption to the client and advisors as possible
- Communicate with clients and prospects clearly using proper written and spoken language
- Track all open requests closely, with crazy attention to detail
- Build close relationships with clients by making them feel cared for
- Communicate as often as necessary with clients who have an outstanding request
- Keep client files organized and updated
- Log every activity and event related to your clients into Salesforce.com, our CRM, to ensure it is updated and current.
- Be the intermediary between clients, advisors, and our custodian, making sure the custodian does their job for the client
- Support the rest of the Abacus CSAs by filling in for them when they're sick or on vacation, when they are unseasonably busy, or when they're sad

How to Excel

Oh, you want to be the best CSA we have ever had? Here's how:

- You're an excellent communicator, both on the phone, in person, and in writing. This is critical
- You are willing to study and pass the Series 65 exam and obtain the Registered Paraplanner certification. This requires a decent amount of financial acumen, so if numbers scare you, you may be looking at the wrong opportunity

- You are obsessive about organization and task management. You probably alphabetize your spice rack
- You sincerely love dealing with people. You treat your clients and your team like family.
- You make stuff happen. In fact, you're probably already thinking of a creative way to set yourself apart and get this job
- People always ask you to help because when you say you're going to do something, you do it. Every time. Without fail

Nice-to-Haves

You should have some level of business education, but a college degree is not required. We would love to see you have, or be willing to get, your Parapanner certification and pass the Series 65 exam. We find previous financial industry or especially investment advisory firm experience highly desirable.

To apply, please contact Barbara@abacuswealth.com