

Registered Client Service Associate

Job description

Come join one of the fastest growing RIAs in the industry. At Wedmont we are changing the way successful families receive financial advice. Wedmont's flat fee model and direct indexing capabilities are disrupting the wealth management industry, and we are hiring a client service associate to help lead our operations function. If you are a client services professional who is a self-starter, with strong analytical and people skills, and a detail-oriented approach, we want to meet you!

This is a 100% remote position with opportunity for significant career progression. Competitive compensation and benefits.

RESPONSIBILITIES:

- Work closely with firm leadership and wealth advisors to ensure clients receive the highest level of operational support and service
- Execution of complex client service tasks including new client onboarding and new account openings
- Respond to issues and concerns raised by clients, working closely with other team members to find solutions
- Process all money movement requests in an accurate and time-sensitive way (gifting, journals, wires, account transfers, RMDs, tax payments, etc.)
- Diligent use of CRM system
- Support other tasks within the organization and perform special projects as needed
- Maintain updated knowledge of industry best practices for delivering a best-in-class client experience

INDIVIDUAL CHARACTERISTICS:

Success in this role requires the candidate to have the following characteristics:

- Compliance driven mindset
- Insistence upon adherence to standards and procedures
- Ownership mentality
- Excellent written and verbal communication skills
- Ability to perform with little supervision, relying upon prior experience and knowledge to provide proactive service to clients and the Wedmont team
- Problem solving by anticipating obstacles, developing plans to overcome them, and finding ways to improve
- Passionate about making a positive difference in the lives of Wedmont clients
- Desire to be an integral and collaborative member of a close-knit team

REQUIRED EXPERIENCE AND QUALIFICATION

- 2+ years of relevant financial services experience
- Bachelor's degree

- Experience with Charles Schwab Advisor Center and Orion is preferred
- Series 66 or 63/65 preferred
- Clean compliance record and background check

COMPENSATION

- \$60,000 - \$90,000 depending on experience
- Benefits include health, generous vacation, and 401(k)

Equal Employment Opportunity

It is the policy of Wedmont Private Capital, LLC to ensure equal employment opportunity (EEO) for all employees and applicants for employment without regard to race, color, religion, sex, pregnancy (including childbirth, lactation, or related conditions), national origin or ancestry, age, disability, veteran status, uniformed servicemember status, sexual orientation, gender identity, status as a parent, genetic information (including testing and characteristics), or any other characteristic protected by applicable federal, state, or local law. It is Wedmont's policy to comply with applicable laws concerning the employment of persons with disabilities, including reasonable accommodation for applicants and employees with disabilities.