

## CLIENT SERVICES MANAGER

**Reports to:** Director of Client Services – Fairport Wealth

**Location:** Cleveland, Ohio

**Benefits:** Yes

**Status:** Full-time

### JOB PURPOSE

The **Client Service Manager** will provide excellent client services support to clients and wealth managers within the firm by assisting clients, completing and processing paperwork, resolving any service issues and maintaining meaningful client relationships.

### DUTIES AND RESPONSIBILITIES

- First point of client contact for all client service requests
- Assist and support wealth managers with client service issues that arise with regard to existing and prospective clients
- Preparation and tracking of client custodial account paperwork from start to finish for new and existing relationships
- Completion of all client cashing needs
- Maintain up-to-date client records and document all client contact and service work
- Schedule client meetings and prepare necessary materials
- Client tax payments and bill pay as needed
- Establish client relationships and provide an exceptional experience via in-person, telephone, and email client interactions
- Provide clients and advisors with account information and address concerns through follow up and resolution
- Assist with company initiatives or projects as needed
- Maintain compliance with all corporate and regulatory standards
- Other duties as assigned

### QUALIFICATIONS

- 2-5 years of experience working in financial services with high-net-worth clients preferred
- College degree preferred
- Knowledge of regulatory environment for financial services sector preferred
- Self-starter - must be detail-oriented and take initiative on duties and responsibilities
- Requires effective oral and written communication skills, excellent interpersonal skills
- Must be comfortable with face-to-face client interaction
- Critical thinker with ability to prioritize and adapt
- Excellent organizational skills
- Working knowledge of Windows and Microsoft Office
- Experience with Orion, eMoney, and Salesforce CRM a plus, but not required
- Desire to work in an entrepreneurial environment with a small company feel
- Represents our core values of: Team Over Self, Engaged, Initiative, Empathetic, and Continuous Improvement
- Prior Management experience a plus