

CLIENT SERVICES MANAGER

Reports to: Director of Client Services – Fairport Wealth/Luma 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
- Previous experience in back office financial services is a plus
- 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