

# Client Services Associate

**Locations:** Indianapolis, IN or Jupiter, FL

**Employment Type:** Full-Time

## About Us

We are a dynamic, mid-size broker/dealer and financial advisory firm committed to delivering exceptional client experiences. Our team thrives in a fast-paced environment where collaboration, innovation, and client success are at the heart of everything we do.

## Position Overview

The Client Services Associate plays a critical role in supporting advisors and ensuring an outstanding client experience. This position involves direct client interaction, operational support, and proactive engagement to maintain and strengthen client relationships.

## Key Responsibilities

- Coordinate and prepare for client review meetings, including assembling reports and documentation.
- Handle inbound and outbound client communications via phone and email with professionalism and accuracy.
- Assist with financial planning tasks and maintain client accounts in accordance with firm policies.
- Process account updates, transfers, and service requests promptly and accurately.
- Utilize technology platforms to manage workflows, track tasks, and maintain client records.
- Collaborate with advisors and team members to ensure seamless client service delivery.

## Qualifications

- Bachelor's degree in Finance, Business, or related field preferred.
- 1–3 years of experience in financial services, brokerage, or advisory environment preferred.
- Strong organizational skills with the ability to manage multiple priorities in a fast-paced setting.
- Excellent time management and attention to detail.

- Proficiency with financial software and CRM systems; strong Microsoft Office skills.
- Exceptional communication and interpersonal skills; a team-oriented mindset.

## What We're Looking For

- Individuals who thrive in a client-focused, high-energy environment.
- Tech-savvy professionals who embrace new tools and processes.
- Team players who value collaboration and accountability.

## Benefits

- Competitive salary and performance-based incentives.
- Comprehensive benefits package including health, dental, and retirement plans.
- Opportunities for professional development and career growth.