Client Services Manager Job Description

Job Opening
Client Services Manager

Full-Time/Part-Time
The Client Services Manager role is a Full-Time position.

Location
Louisville, KY

Being Part of the Saling Wealth Advisors Team
Saling Wealth Advisors is a full-service, Registered Investment Advisor (RIA) located in Louisville, KY. We are an independent firm and we take pride in delivering personalized wealth management services anchored by experienced, Certified Financial Planner™ professionals. Join our team and be part of a family-centric culture whose mission is to help our clients plan, organize, and execute every important decision of their financial lives.

Benefits
- Competitive salary and potential bonus compensation
- Group health insurance coverage
- 401(k) savings plan with potential company contributions
- Professional development support where appropriate

Job Description and Responsibilities
The Client Services Manager serves as the day-to-day face and voice of Saling Wealth Advisors to our clients and other strategic partners. As Client Services Manager, you will be expected to:

- Manage incoming client phone calls, greet clients for in-office visits, and direct any advanced client requests to the appropriate team members
- Serve as office expert, manager, and coordinator of account paperwork and other administrative records with our back-office custodian
- Ensure timely preparation of signature-ready paperwork for client meetings and timely processing of all money movement requests
- Manage office calendars for the team by scheduling client reviews, booking conference rooms
- Provide support for firm-wide wealth planning projects, marketing campaigns, and other projects as needed
- Manage office supplies inventory and appearance of open office spaces

Qualifications for Client Service Manager
- Professional client service experience is a must. Financial services experience preferred
- Proven consistency providing timely, accurate, and friendly client communications
- Detail-oriented approach to task management and high proficiency in prioritizing workflow
- Advanced time management skills
- Proficient in Microsoft Office products and ability to become expert in our custodian's technology platform.
- Prior expertise with CRM technology preferred.
- Education: Associate degree or higher. Desire and willingness to obtain relevant industry certifications if needed.

If you are interested in joining the Saling Wealth Advisors team as a Client Services Manager, please email your cover letter and resume to Jeff Gough, jeff@salingadvisors.com