



## **Client Service Administrator (Associate) –Full Time**

### **The Role**

The Client Service Administrator (Associate) supports the principal and advisors as an office administrator and would work under the Senior Service Advisor. This is an entry level position, with the goal of moving towards Service Advisor in 3 years.

### **Duties**

- Work with Senior Service Administrator to provide supporting reports to advisor before meeting; after meeting, review and document meeting with advisor.
- Track, manage, and maintain all client records, both electronic and physical, leveraging Client Relationship Management (CRM) software to continually enhance procedures.
- Complete custodian forms; monitor and resolve issues with custodian.
- Data Entry and Financial Planning Software
- Keeping Client Files Accurate and Up-to-Date
- Social media, newsletters, website and client mailings
- Client Event Planning

### **Skills and Experience**

#### Required

- Bachelor's degree in finance or other business specific major
- Proficient at Microsoft Office, Excel, and Adobe Acrobat
- Technology skills coupled with ability to learn new software quickly and comprehensively
- Excellent verbal and written communication skills
- Meticulous Attention to Detail
- Professional Work Attire
- Promptness
- Proactive and Self Motivated

The candidate should be driven by a passion for providing excellent client service and will work both independently and collaboratively with Senior Service Administrator, Advisors and Principal. The candidate's professionalism will reflect his/her work ethic, high level of integrity, and regard for confidentiality.

### **About Our Firm**

Kaizen Financial Advisors, LLC, is a successful wealth management firm focused on helping clients navigate complexities in life—financial or otherwise. We offer a broad range of wealth management and financial planning services to clients in the high net-worth space, with an emphasis on providing excellent service based on our deep client relationships.

Join our growing and prosperous business and work with a friendly, collaborative team to provide a superior client experience. We offer a challenging and fun work environment, competitive salary, and an excellent benefits package, including medical, dental, and retirement.

*If you believe you meet the criteria and align with the values of our firm, please forward your cover letter and resume to:*

Laurie Klein, Principal, CFP, ChFC

[laurie@kaizenfa.com](mailto:laurie@kaizenfa.com) / [www.kaizenfa.com](http://www.kaizenfa.com)