Promus Advisors, LLC, a boutique wealth management firm providing comprehensive family office, financial planning and investment management services are currently looking for a Client Service Advisor to join our Dallas, Texas based firm. Promus entities, across multiple lines of businesses, are responsible for client assets in excess of $1 Billion for approximately 30 high net worth clients.

A Client Service Advisor within a boutique practice such as Promus must have tremendous interpersonal skills, an ability to multi-task, possess a concierge approach, be self-motivated with a "Can Do" attitude, all the while possessing an Owner's mindset. All employees at Promus must be willing to perform virtually any task that is required, regardless of employee title or position. On any given day, the Client Service Advisor will perform one or more of the following:

- Work directly with a Lead Financial Advisor as an integral member of a client service team delivering a comprehensive array of wealth management services
- Communicate, both written and verbal, directly with client and client professionals
- Develop presentation materials for client, prospect and professional advisor meetings
- Manage input of client financial data into portfolio management software (such as Orion/Black Diamond); verify accuracy, troubleshoot errors, and ensure the highest quality of all reports
- Organize client financial data into comprehensive proposals and reports
- Monitor investment compliance with Investment Policy Statements and other client guidelines
- Prepare all forms required for client signature (account opening, investment agreements, etc.)
- Assist in firm initiatives, office management and other administrative tasks

The Client Service Advisor position does not require a series 7 license or extensive industry experience, however the following competencies and qualifications would be a plus:

- Bachelor's degree (Masters preferred)
- Experience with Orion portfolio management software (or similar programs) and the forms, processes and procedures at Pershing Advisor Solutions (or similar custodians such as Schwab)
- Basic understanding of comprehensive personal financial planning, including retirement planning, employee benefits, insurance, investment vehicles, asset allocation, estate planning, income tax and executive compensation
- Work without close supervision, prioritize multiple deliverables and proactively solve problems
- Ability to thrive in a collaborative, small-office environment
- Strong proficiency in Microsoft Excel, Word and Outlook
- CFP®, or demonstrated progress toward the CFP®, preferred (as well as CPA, PFS or CFA)

Promus can offer you an exciting, hands on, fast-paced working environment, with the opportunity to play a vital role in our firm's growth and expansion. Promus offers a competitive salary and benefits package. For more information on Promus Advisors, visit www.promusadvisors.com.

Promus Advisors is an equal opportunity employer and considers all qualified applicants for employment without regard to race, color, religion, sex, national origin, or other legally protected characteristic. Interested applicants should send their resumes with cover letter to recruiting@promusadvisors.com. No phone calls or direct mail, please. No third parties.