# Client Service Associate

Wealth Covenant Group, located in Houston, is seeking a Client Service Associate to join our team. We work with a select group of families and strive to offer more than just excellent wealth management services. It is our passion to help our clients achieve what's important to them, and our joy to come beside them as their trusted advisor.

The Client Service Associate is a great communicator, detail-oriented and enjoys the challenge of providing awesome service. This is a great opportunity to play a key role in the lives of our clients and the continued success of our company.

## Responsibilities & Activities

- Client and guest communications and interaction through phone, email, mail or meeting
- Maintains accurate databases, data files, notes and activities
- Opens new accounts and processes account changes, transfers, and deposits/withdrawals
- Prepares for meetings and coordinate completion of action items with clients and clients' advisors (CPA's, Attorneys, etc.)
- Develops, maintains and enhances operations and written systems of office activities and workflows

## Educational & Industry Requirements

- Minimum Bachelor's Degree
- Minimum of 2 years of professional wealth management or financial services experience
- Experience with account opening and maintenance (Fidelity a plus), office processes and workflows

## Knowledge, Skills, & Abilities

- Proactive, strong work ethic and ability to discreetly handle confidential data
- Engaging communication skills and work well in a team environment
- Excellent attention to detail and extremely organized
- Strong service and problem-solving skills
- An ability to prioritize and manage multiple tasks concurrently…follows up and follows through
- Desire to serve clients and team members with excellence
- Highly proficient in client relationship management and portfolio reporting software (Redtail and Orion a plus) and Microsoft Office Suite

Our culture promotes collaboration, professional growth, and a commitment to providing exceptional client service. If you have a relentless, burning desire to succeed and love helping people, then we would love to hear from you!

Please send your resume and letter of interest to dennis@wealthcovenantgroup.com .