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## Client Service Associate – Flower Mound, TX

Glen D. Smith & Associates, a growing wealth management firm with Raymond James, is seeking a Client Services Associate to assist us in our mission of helping clients achieve their financial goals.

Glen D. Smith has been named one of Forbes Best-In-State Wealth Advisors by Shook Research in 2021. He has also been quoted in NBC News, US News and Investopedia among other publications.

**Job Summary:**

As the first and last person clients see when they are in the office, the Client Service Associate is instrumental in making sure clients have a positive experience.

The Client Service Associate enhances the client experience by providing exceptional client service, supporting Branch functions as needed, assisting in safeguarding client assets, and serving as administrative and operational support to Financial Advisors.

You will be responsible for understanding firm policies, procedures and digital capabilities that will allow you to interact with the Financial Advisors, as well as new and existing clients. Routine contact with internal and external customers is required to obtain, clarify, or provide facts and information.

**Essential Duties and Responsibilities:**

* Handles calendars for the Financial Advisors and others in the office.
* Greets clients and prospective clients in a friendly and sincere manner
* Interacts daily on the phone and in person with prospective and existing clients including handling basic inquiries.
* Research client and security information through Raymond James systems.
* Processes and follows up on client documentation for proper maintenance of accounts.
* Prepares letters, forms, and spreadsheets to assist with servicing existing clients and prospecting for new clients.
* Ensures required client paperwork is current with firm and industry requirements, rules and regulations.
* Handles miscellaneous operational activities.
* Maintains databases and creates reports using portfolio software programs.
* Assists Financial Advisors with marketing efforts including seminars, etc.
* Receives cross-training and assists with other operational functions as required.
* Performs other duties and responsibilities as assigned.

**Knowledge, Skills, & Abilities:**

* Detail Oriented
* Excellent attitude and an extraordinary client service orientation
* Superior phone skills—friendly and helpful in all interactions on the phone.
* Excellent organizational and time management skills
* An ability to handle multiple tasks within tight time frames
* Proficiency with Microsoft Office Suite
* Strong analytical and research skills
* Strong verbal, written, presentation, and interpersonal communication skills
* College Degree

We offer a great working environment in a beautiful and professional office location. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational, and focused on improving our client’s lives.

**Raymond James Guiding Behaviors**

At Raymond James our associates use five guiding behaviors (Develop, Collaborate, Decide, Deliver, Improve) to deliver on the firm's core values of client-first, integrity, independence and a conservative, long-term view.

We expect our associates at all levels to:

• Grow professionally and inspire others to do the same

• Work with and through others to achieve desired outcomes

• Make prompt, pragmatic choices and act with the client in mind

• Take ownership and hold themselves and others accountable for delivering results that matter

• Contribute to the continuous evolution of the firm

***If you’re interested in this opportunity, please send your resume and letter of interest to Annie Chumbley at annie.chumbley@gdsandassociates.com Given the high demand for this position, we’re only able to contact the most qualified candidates.***