

Client Service Associate

Brownlee Wealth Management is seeking a client service associate to support the firm's wealth advisors. The ideal candidate is comfortable working on several different types of projects and assisting in the business's operations.

- **As a client service associate, your primary responsibilities will be:**
 - Opening new accounts, moving money, maintaining accounts, and everything related to managing custodial relationships at TD Ameritrade and Fidelity
 - Updating our client relationship management (CRM) software with all notes and tasks related to servicing clients
 - Managing the quarter-end billing and performance reporting process using Orion, Fidelity, TD Ameritrade, and Advicepay
 - Maintaining our client portal (eMoney) and performance reporting software (Orion) by linking, titling, and grouping accounts
 - Ensuring continuity of data across CRM, client folders, and client portal
 - Supporting business development with scheduling and follow-up emails for prospects of the firm
 - Writing policies and procedures and working with the COO to develop best practices and workflows
- **Additional tasks may include:**
 - Generating investment proposals and conducting investment research
 - Digital marketing, website management, and updating social media platforms
- **Preferred Qualifications and Skills:**
 - Located in The Woodlands, TX or Northwest Arkansas
 - Industry experience
 - A team player with a "no job is beneath me" attitude
 - Comfortable working independently
 - Organized and detail-oriented
 - Intellectually curious and comfortable with problem-solving
 - Experience with industry-specific tools (ex. Orion Advisor Services, Eclipse, Wealthbox, Hubly, TD Ameritrade Veo One, Fidelity Wealthscape, Advicepay)

About Us: Brownlee Wealth Management is a fee-only financial planning firm with offices in The Woodlands, TX, and Bentonville, AR. We exist to provide exceptional advice with a specialty in executive compensation for Oil, Gas, and PetroChemical Professionals. We help families simplify their investments, lower their taxes, and grow their wealth. We're a young company founded in 2019 but growing rapidly due to our laser focus on our niche. We believe in being fiduciaries and operating in the best interest of our clients at all times.

- **About the Role**
 - Full-Time W2 Position in Bentonville, AR or Houston, TX
 - Compensation: \$50,000 - \$70,000 annual salary depending on experience
 - Benefits include: retirement plan with match, unlimited vacation, company Macbook, company-paid professional development

Send resume and cover letter to info@brownleewealthmanagement.com (bonus points if your cover letter is a video!)