Client Service Associate

Summary of Position

The Client Service Associate (CSA) will report to the Director of Client Service and will be responsible for the daily administration tasks for the firm and its clients.

Administrative Duties and Responsibilities

Will scan, copy, and file electronic & physical paperwork for clients and firm. From time to time will process mailings.

Client Services

Service Items in General Queue

- ☐ **Paperwork:** As part of the operations team, assisting clients and the advisory team with all non-advisory questions and paperwork, such as processing all forms and applications, including opening accounts, account address changes and other online applications necessary to process clients' business transactions
- ☐ Responsible for tracking and completing client service issues and new business transactions in progress and reporting on a weekly basis
- ☐ Move Money Setup & Follow-Up

Tamarac Advisor View

- ☐ Complete all sessions of Tamarac Advisor University online within 3 months
- ☐ Production of performance reports (and additional reports from time to time)

Custodians

- ☐ Complete selected sessions of custodian training (Schwab & Fidelity) within 3 months
- ☐ Process physical & eSignature document packets
- ☐ Money Movement
  - Wires, checks, journals, etc.

Quarterly Statement Production

- ☐ Work with Operations Team to ensure they are out in a timely manner (Paper & E-Statements)

Miscellaneous

May be asked to work on task-based projects outside of regular responsibilities, including additional office tasks on an as-needed basis.

Perks

Client events, teambuilding events, Happy Hours, team lunches.
Flex Schedule after 3 months (WFH 2 days a week).
Conference attendance.
401k match, Health Insurance, Life Insurance, Disability offered. New Parent leave, PTO.

Candidates should apply with their resume to Marie Villard **marie@finsyn.com**