## A picture containing text Description automatically generated

## **Client Service Associate**

## **Job Overview**

Goepper Burkhardt is a Fee-Only, Registered Investment Advisory firm. Our mission is to help clients navigate the complexities of retirement investing and financial planning.

## **Responsibilities and Duties**

* Assist Client Service Director with client communication, back-office support, and other areas of client service.
* Maintain accurate notes and records utilizing Customer Relationship Management software.
* Assist with special/administrative projects.

**Job-Specific Core Competencies**

* Regularly exhibits high service standards that ensure client satisfaction.
* Speaks and writes in a clear, professional, and discernable manner.
* Possesses a passion to help new and existing clients.
* Must be organized, detail-oriented and able to multitask.
* Ability to work independently as well as be collaborative.

**Firm-Wide Core Competencies**

* Recognizes what tasks are most critical and gives those tasks more time, attention, and energy.
* Is honest, open, and transparent.
* Demonstrates a commitment to accuracy by delivering high quality, error-free work.
* Demonstrates ability to work successfully in an entrepreneurial, small company environment.

## **Qualifications**

* Bachelor’s Degree preferred.
* Proficiency in Microsoft Office.

**Salary & Benefits**

* Salary commensurate with experience.
* Benefits include 401(k), disability, life, dental, healthcare stipend and paid time off
* Potential for career advancement and company paid education.

If interested, please send cover letter and resume to: [services@gbrwm.com](mailto:services@gbrwm.com)