**-Financial Planning/Client Service Associate**

[Clear Rock Advisors, LLC](https://ttu.admin.12twenty.com/Companies#/Companies/181499994419166)

Dallas - TX (United States)

Full-Time

* Support and collaborate with firm's team to prepare financial plans for Clear Rock clients.
* Perform in-depth tax and distribution analysis.
* Clearly communicate with clients to ensure accuracy and relevance of data and analysis.
* Provide operational support including cash management, investment subscriptions and redemptions, disbursements, receipt of custodial statements, account discrepancies and/or maintenance issues.
* Deliver high touch service to firm’s clients, through timely and accurate interaction, including telephone, email, Zoom, and face-to-face meetings.
* Troubleshoot and resolve client related matters and serve as a critical liaison with clearing firms and third-party service providers.
* Reconcile assets from custodians and ensure new accounts are set up on custodial feeds to other third-party providers.
* Continually strive to develop and improve processes, standardized templates, procedures and materials.
* Assist in reviewing policies, procedures, and practices to ensure compliance with all laws and regulations.
* Provide bookkeeping services for select family office clients.
* Additional responsibilities as Clear Rock shall determine from time to time.

**Description:**

Clear Rock Advisors, LLC is a Texas-based SEC Registered Investment Advisor that specializes in comprehensive financial planning and investment management services for high-net-worth clients.   We are seeking to add an experienced Financial Planner / Client Service Associate to our team to support the firm’s business growth.  This is a full-time position with competitive compensation package.  The ideal candidate is motivated, conscientious, diligent and looking for an opportunity for long term advancement.  We prefer a candidate who is CFP, working toward the CFP, or highly motivated to complete the CFP in the near-term.

**Job Dates**

Application Begins On

02/01/2022, 12:00am CST

Application Deadline

05/01/2022, 12:00am CDT

Anticipated Job Start Date

06/01/2022

**Interview Detail**

Royce Medlin, Clear Rock Advisors, LLC Chief Investment Officer

**Application Information**

Application Method(s)

* Apply via Email: royce@clearrockadvisors.com

Application Documents

Resume (Required)

Cover Letter (Required)