**Overview:**  
The Client Service Advisor is responsible for the day-to-day duties of helping clients, opening and maintaining client accounts, and serving as a key contact person for account-related client requests.  
  
**Job Responsibilities:**

* Schedule and prepare for client review meetings.
* Initiate and field client service calls.
* Work closely with various custodians and insurance carriers to process client service requests.
  + Prepare and process the necessary paperwork, when required, to complete client service requests.
* Prepare and process account opening paperwork for advisory accounts, insurance policies, and annuity policies.
* Proactively manage suitability review and other notifications associated with new accounts.
* Manage the underwriting process for new insurance policies including:
  + Ordering and follow-up on medical records
  + Communication with BGA and carriers for status updates and negotiation.
* Utilize our paperless filing system.
* Document and process actions throughout day utilizing the company’s CRM system, SmartOffice.
* Maintain client accounts:
* Assist in obtaining, updating and maintaining client data/information throughout appropriate custodian and internal computer system.
* Add features such as options, margin, aggregate/multi-margin, check writing, debit cards, eDelivery, Moneylink, view only authorizations, etc.
* Update beneficiaries.
* Add POAs & DPOAs.
* Assist with account transfers and rollovers from outside firms and checking asset transferability/acceptance.
* Ensure agreements and questionnaires are current.
* Initiate and track asset/money movements including, journals, EFTs, ACATs, charitable giving, wires, DTCs, check withdrawals, etc.
* Assist clients with login requests
* Monitor custodian alerts and resolve issues.
* Monitor progress on all tasks and follow up as needed to ensure completion of tasks.
* Troubleshoot client service-related issues as needed.
* Assist with special projects as required.

**Job Requirements:**

* Bachelor’s degree preferably in business, accounting, finance, economics or related experience.
* Continuously exhibits personal integrity and professional initiative.
* Reliable, follows through on commitments, does not shrink from new challenges.
* Familiar with Microsoft Office
* Experience with CRM, portfolio management and document management software (preferred).
* **Must be organized, detail-oriented, and able to multitask.**
* Demonstrates a commitment to accuracy by delivering high quality work.
* Exhibits a desire to exceed expectations.
* Excellent written and verbal communication.
* Collaborative and able to work effectively with others.

If interested, send your resume to: Donna Medcalf at [donna@graniteharbor.com](mailto:donna@graniteharbor.com)