



DENNIS STAVINOCHA, INC.
Your Vision. Your Plan. Your Wealth.

We are a wealth management firm located in Northwest Houston seeking a Client Service Associate to join our team and to help make a positive difference in the lives of our clients. We handle the financial matters for a select group of families and business owners.

Client Service Associate

Responsibilities

- Client communications
- Maintains databases and data files
- Prepares materials for meetings
- Opens and processes account requests
- Coordinates completion of meeting action items with clients and clients' advisors
- Maintains efficient operation of the office
- Assist with compliance and registration
- Create, maintain and enhance written office systems and procedures
- Prioritize and deliver on most critical issues or activities on a daily basis

Qualifications

- Minimum financial client services experience of 2 years
- Experience with account opening and maintenance forms, processes and procedures
- Detail-oriented, accurate, organized and able to set priorities in managing projects
- Ability to handle multiple tasks and impeccable follow through
- Excellent attitude and a genuine interest in serving and caring for people
- Ability to thrive in a collaborative, small-office environment
- Strong proficiency with Microsoft Outlook, Excel and Word

Interested applicants can send their resumes with a cover letter via email to dennis@dennisstavinocha. Dennis Stavinocha, Inc. is an equal opportunity employer and considers all qualified applicants for employment without regard to race, color, religion, sex, national origin, or other legally protected characteristic. No phone calls or direct mail, please. No third parties.