

# Trellis Advisors, LLC

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## **CLIENT SERVICE SPECIALIST (Seattle, WA)**

### **US**

We are a busy and growing boutique wealth management firm with two offices, a roster of high caliber clients, and an amazing team and we're looking for an awesome Client Service Specialist to join us.

### **THE JOB**

Based in our Seattle office, this position plays a major role in our ability to provide each of our clients with top notch service by gathering data, creating models, building scenarios, drafting presentations, managing client investments, developing and implementing financial plans, and attending client meetings to observe and learn.

### **YOU**

Our ideal candidate is a master at multi-tasking with a passion for client service, a drive to learn and grow, a dedication to details, the ability to thrive in a fast-paced, deadline-driven environment, mad PC skills, and the ability to grasp financial concepts and new technology tools quickly (read: climb a ginormous learning curve). Also important: a Bachelor Degree from an accredited university. Some experience (2-5 years) in wealth management, investment management, accounting, finance, or a related field in a supporting capacity is preferred, but definitely not required. An interest in obtaining the CFP® credential is fantastic!

### **INTERESTED?**

If so, send us your resume and a cover letter in PDF format.

Really wanna knock our socks off? Include a cover letter. We wanna know who you are, what you bring, and why this sounds like a great place for you.

### **TWO ITEMS OF NOTE:**

1. We are a fee-only firm, so we don't sell products nor do we earn commissions; we're all about our clients' peace of mind; and
2. We're also all about security, so we don't open non-PDF docs, nor do we click on links. So PDF your stuff!

We look forward to hearing from you!

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#### **Seattle Office**

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