

Client Service Associate

Providing exceptional service to our clients starts with investing in exceptional people!

We are an independent wealth management firm committed to providing "Advice at a Higher Level" to our clients. A contributing factor to our success is a unique team structure. How do we build a successful team? We foster a culture of professional development, collaboration and respect. We are passionate about what we do. We have fun, we work hard and we are nice to each other. A successful team takes care of each other. This translates to a highly competitive Total Rewards package, including a generous benefits package and a paid time off policy that reflects our commitment to a healthy work-life balance.

The Client Service Associate Role

The Client Service Associate (CSA) performs duties which directly impact the client experience. The CSA supports the Relationship Managers in preparing and processing documentation related to client implementation and on-going maintenance for both private clients and retirement plans. This is a non-exempt position, reporting to the Client Services Manager.

- Prepare and process documentation related to client onboarding and maintenance including account applications, transfer documents and other forms as required.
- Complete miscellaneous administrative tasks that support the client relationship as assigned by the Relationship Manager and log all activities in the firm's CRM in a timely and accurate manner.
- Perform client and prospect data entry in the firm's CRM. Ensure data accuracy and integrity and keep records current on existing and prospective clients.
- As requested, coordinate client retention processes including anniversaries, Thank You notes, flowers and/or gifts.
- Positively engage with all members of the team in a professional office setting to support and advance Cable Hill's culture.
- Perform back-up duties for Administrative Specialist. May assist with general office duties, including answering incoming phone calls, greeting clients, office supply management, mail processing, internal and external event coordination and meeting management.
- Assist with projects as needed.

Your Work Experience, Skills and Education

- A minimum of two years of administrative experience in a professional setting. Experience must include professional interaction by phone and in person with clients.
- Expected to gain competence in industry terminology and concepts that support their job description.
- Undergraduate degree required.
- Salesforce experience preferred.
- Proficiency in Microsoft Office Suite products required.
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Skills & Attributes

Teamwork – Highly collaborative and dedicated to continuous perfection of CHP's ability to deliver superior customer service to its clients.

Customer Service – Exceptional internal and external customer service skills. Ensures positive interactions through active listening and professional feedback.

Communication – Excellent oral and written communication skills. Projects a professional, capable image in both action and appearance.

Integrity – Exhibits a high level of integrity through interactions with internal and external customers. Goes above and beyond to do what is right for team members and clients.

Professionalism – Exhibits a professional and capable demeanor to clients and external affiliates. Represents CHP in a positive manner in all interactions with clients and affiliates.

Engagement – Contributes to the development of CHP through engagement and enthusiasm. Acts on the belief that every employee contributes to the success of CHP. Builds effective working relationships with colleagues.

Capacity – Strong time management skills, with an ability to effectively organize and prioritize tasks. Manages heavy, time-sensitive workloads, while maintaining accuracy through a strong attention to detail.

Judgment – Skilled problem-solving, particularly for obstacles in which the next course of action is unclear. Without hesitation, seeks guidance and direction when unsure of how to proceed.

Reliability – Understands and responds to the importance of being a dependable team member. Arrives to work on time, keeps calendar updated and communicates barriers with team members if tasks cannot be completed on time.

We strongly urge people from unrepresented groups to apply.

Cable Hill Partners provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, sexual orientation, national origin, age, disability or genetics. In addition to federal law requirements, Cable Hill Partners complies with applicable state and local laws governing nondiscrimination in employment. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

Cable Hill Partners expressly prohibits any form of workplace harassment based on race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, genetic information, disability, or veteran status. Improper interference with the ability of Cable Hill Partners' employees to perform their job duties may result in discipline up to and including discharge.