CLIENT SERVICE ASSOCIATE

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. We are a growing team of nine separated across two business segments: Wealth Management and Asset Management. We are currently seeking a Client Service Associate to join our growing Wealth Management division.

JOB SUMMARY

The Client Service Associate will be a part of the firm's Wealth Management team. Responsibilities will include supporting the firm's Wealth Advisors by responding to client inquires, completing client onboarding and account maintenance tasks, and developing quality relationships with our custodians.

KEY ACCOUNTABILITIES

- Prepare all custodian paperwork for new clients/accounts and interface with custodians to ensure accurate set-up and transfer of assets. This includes account maintenance, such as trustee changes, account registration changes, etc.
- Ensure timely responses to all client correspondence and inquiries.
- Work directly with our custodians' operations teams to execute account administration and transaction processing properly and accurately.
- Maintain all pertinent client information in the CRM system and document management system.

QUALIFICATIONS

- Well organized with extraordinary attention to detail and the ability to support multiple advisors.
- Responsive and effective communicator, verbally and in writing.
- Possess strong ethics, with the ability and dedication to develop an effective working relationship with our team and to successfully serve a diverse client base.
- Tech savvy, with the proficiency to quickly learn new technology tools, platforms, and software.
- Ability to work in teams or individually, and be flexible to work under tight deadlines and changing client needs.

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- BA/BS degree
- Proficient in Microsoft Office

HOW TO APPLY

For further inquiry, please email **benjamin.monte@montefinancialgroup.com** with an attachment of your resume as a PDF.

For additional company information you may find us on **LinkedIn** or on our **Website**.

All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.