CLIENT SERVICE ASSOCIATE

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. Our expanding team operates across two business segments: Wealth Management and Asset Management. We are currently looking for a Client Service Associate (CSA) to join our client service team and grow with the firm as we continue to expand and serve our clients.

JOB SUMMARY

As a Client Service Associate, you will be a part of the firm's client service team. This position is onsite, located at our Guilford, CT office. You will work closely with clients, their investment custodians, and our team of wealth advisors providing a wide range of servicing needs such as responding to client inquiries and completing client onboarding and account maintenance tasks.

KEY ACCOUNTABILITIES

- Deliver exceptional client service by addressing client needs and concerns effectively, supporting clients throughout their financial journey, and ensuring a high level of client satisfaction.
- 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.
- Respond to all client correspondence and inquiries in a timely and professional manner, ensuring clear and effective communication.
- Work closely with custodian operations teams to accurately execute account administration and transaction processing, addressing any issues or discrepancies promptly.
- Maintain and update all relevant client information in the CRM and document management systems, ensuring accuracy and confidentiality.
- Stay informed about industry regulations and compliance requirements to ensure all client interactions and account processes meet legal and firm standards.

QUALIFICATIONS

- Highly organized with exceptional attention to detail and the ability to support multiple advisors.
- Responsive and effective communicator, both verbally and in writing.
- Uphold strong ethical standards with a steadfast commitment to maintaining the confidentiality of sensitive client and firm information.
- Tech-savvy with proficiency to quickly learn new tools, platforms, and software.
- Capable of working both independently and as part of a team.
- Flexible and adaptable to tight deadlines and evolving client needs.

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- Entry-level
- BA/BS degree
- Proficient in Microsoft Office
- Minimum GPA of 3.0

HOW TO APPLY

For further inquiry, please email **madelyn.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.