Leslie Roper Day & Associates
Down-to-earth financial advice.

# Client Service Associate (Part Time)

**Job Responsibilities:** This position will support two financial advisors and work with two support staff to help serve our clients. Initially, this position's responsibilities will be to:

- Interact with clients via phone, email, and in-person meetings.
- Handle client questions and promote client interactions to maintain strong relationships.
- Organize and prepare portfolio review materials for client meetings.
- Prepare and complete client account paperwork.
- Research and monitor various investments.
- Conduct financial plan input, analysis, and development utilizing planning software.
- Research and recommend planning strategies and appropriate solutions to the team.
- Develop spreadsheets and analysis to support client and office needs.
- Take notes, prepare reports and provide summaries for advisor and team meetings.
- Maintain and update processes and procedures.
- Maintain and update client relationship management system.
- Anticipate the advisors' needs and handle them proactively.

**Ideal Candidate:** We are seeking a friendly, detail-oriented professional who has outstanding communication skills, and the ability to manage their time effectively while dealing with a variety of competing priorities. They must be proactive, committed to exemplary levels of client service, and demonstrate the ability to work well as a team member, as well as demonstrates sound leadership. They are well-organized, a self-starter with high follow-through, and are able to work autonomously while also functioning as the financial advisors' right hand. They have exceptional attention to detail, an ability to complete error-free work, and can effectively prioritize their workload to meet deadlines. They are computer savvy, think critically, are able to solve problems, and are eager to learn. They enjoy assisting clients and have a genuine interest in helping people. This position would be ideal for a candidate who is in college pursuing a financial planning degree, or someone looking for experience in the financial services industry.

**Hours & Schedule:** Part time: Approximately 4 hours/day, or 20 hours per week total.

**Required:** Client service experience. Proficient in Microsoft Office (Word, Excel, Outlook, PowerPoint).

**Preferred:** Financial industry experience. B.S. Degree in Finance or equivalent, working towards CFP®, FINRA Series 7 and Series 66 registration.

**Contact:** Please submit resume to info@LeslieRoperDay.com.