High Ridge
WEALTH MANAGEMENT

Client Associate Job Posting

POSITION: Full-Time

The Client Associate at High Ridge Wealth Management, a boutique wealth management practice, provides exceptional client service, supports financial advisory functions, interacts professionally with clients and serves as administrative and operational support to the High Ridge Wealth Management financial advisory team. The Client Associate understands company policies, procedures and digital capabilities and uses this understanding to provide support for new and existing clients and the financial advisory team.

RESPONSIBILITIES:

- Perform administrative duties that support financial advisors in daily business practices, including but not limited to, telephone coverage, coordination of client meetings, processing client account information and file and calendar maintenance
- Maintain existing client relationships through the processing of client requests, resolving client inquiries and making sure key client information and documentation is up to date
- Onboard new client accounts, including the collection of required documentation and client information
- Actively engage in industry training and education programs to maintain current status on policies and procedures

EDUCATION AND EXPERIENCE:

- College degree preferred
- Financial Services Industry experience is a plus

SKILLS:

- Exceptional computer skills and knowledge of Microsoft Office products and virtual conferencing
- Outstanding interpersonal and client service skills
- Relationship building
- Detail-oriented with excellent organizational skills
- Strong written and digital communication skills
- Willingness to collaborate with a dynamic team

WHY YOU SHOULD BE INTERESTED IN THIS ROLE:

- This role is an integral client-facing role in our practice. You are the first impression of the practice outside the partners.
- Your main role (goal) is to provide an exceptional client experience to build, expand, and retain long-term client relationships. You are part of our family. Our clients are part of the family. Together you help the family communicate, grow, and be happy.
- Without you and your kind demeanor, can do attitude, approachability, and project management superpowers the tasks we need to do to successfully help our clients and their portfolios, would be at risk of not getting done or falling on the wrong person.

- You will be protecting the partners from time sucks and helping to create even deeper and more meaningful relationships with the client and the team.
- We need someone to help make sure that our clients always feel heard, valued, and helped in a timely and client focused manner.
- We want you to be able to take ownership over your duties and will provide training, but we do not want to have to micromanage you and how you tackle your day and to-dos once you are up and running. We want you to be able to plan and follow it through.

WHY THIS JOB IS IMPORTANT:

- You will be working hand in hand with our partners to help our clients reach their financial goals seamlessly. You help make the money magic happen!
- We are looking for a warm, outgoing person, with a somewhat strategic mind that can help us create an even better client experience in our practice.
- We really need someone that can take most of the day-to-day client questions off the partners so they can focus on the big picture strategy, portfolio management and 1-1 relationships with clients.

BOTTOM LINE:

We are seeking a loyal, self-inspired, outgoing, organized team member who values relationships!

OUR INFORMATION:

High Ridge Wealth Management
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