1364 South Atherton Street
State College, PA 16801
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MCCLARREN
FINANCIAL ADVISORS

Client Service Associate
Job Description

We are seeking a Client Service Associate (CSA) for our fee-only firm located at our headquarters in State College, PA. We are looking for someone who desires a small firm environment; who wants to be learning and shaping the way we care for our clients. Someone who wants to create streamlined processes; someone that fits into our firm's culture who will embrace new technology while working in a fun yet professional team setting.

Overview:
The role of Client Service Associate is one that supports other team members while serving as the in-house expert on financial related client issues. Your responsibilities will focus on the following three areas: support advisors and clients, trading, and transfer of assets. The CSA must have thorough computer skills as you will be working with Microsoft Excel spreadsheets and the use of various financial programs including but not limited to Wealthbox CRM, eMoney financial planning software, Fidelity's Wealthscape, and Schwab's Advisor Center.

If you don't have experience or a background in finance, that's okay, we can train you! Read on for more details to find out if you might be a match for us!

Job qualities needed (as described in various job duties):

Areas of responsibilities:

Area One - Support Advisors and Clients:

- *Detail oriented* in that you will be responsible for coordinating implementation tasks with team members in both pre and post client meeting activities.
- *Communicates effectively* with clients and team members whether in person, in email or on the phone.
- *Time management skills* are necessary when getting ready for several meetings each day or preparing transfers.

Area Two – Trading

- *Utilize critical thinking skills* in working on post meeting implementation tasks which includes trading. Initially will be to check that trades were executed correctly.
- *Strong prioritization skills* in moments where you have time constraints and have trades that need to be done by end of the day.
- *Organized* in making sure you have all the necessary information to make an informed decision while trading or reviewing trades that others have completed.

Area Three – Transfers of Assets

- *Independent worker* in gathering data and paperwork and putting together a seamless operation of moving client's assets from one custodian to another.
- *Utilize critical thinking skills* in coming across unusual circumstances and creating plans that work best for the client.
- *Polite and clear phone manner* needed when anticipating or providing answers to clients' questions.

Other areas:

- *Team Player with "no job is beneath me" attitude.* Be willing to lend a hand with duties that smaller firms often take care of in-house.
- *Sincere willingness to constantly learn and grow.* Take the initiative to listen in on webinars, and other areas of subject interest.

Responsibilities will include but are not limited to the following:

- Coordinate with lead and associate advisors for client follow up tasks
- Adhere to our firm's compliance manual and other rules and regulations as required by our firm and regulatory authorities.
- Knowledge of financial planning software systems – Emoney, Morningstar
- Knowledge of client relationship management software (CRM system) - Wealthbox

Education and Experience Requirements:

- *High school degree or equivalent*
- Proficiency with Microsoft Office suite, especially Excel is a must.

Benefits:

- Competitive pay with year-end performance-based bonus. Initial compensation will be based on experience and qualifications of the specific candidate. Expect compensation range to be between $40K-$55K/year.
- Yearly salary increases.
- 401k and Roth 401k retirement plan with 5% company match
- Paid vacation in addition to having your birthday off and 8 paid US holidays
- $50K of Life and Accidental Death Policy
- Employee stipend for educational, financial organizational dues and conference opportunities
- Company paid short term disability. Employee paid long term disability is offered as well at a discount
- Company holiday parties and team building events
- Working with a team of individuals that you like!

<u>What you can expect when applying:</u>

- A response back that we are or are not interested at this time.
- If we are interested, we will proceed with a telephone interview
- If phone interview goes well, we will bring you in for an in-office interview
- If that goes well, we will be doing the following background checks/questionnaires:
    - Reference checks
    - Criminal background checks
    - Credit check
- Formal written employment offer is then given to final candidate.

Interested candidates **<u>must send a cover letter and resume</u>** to Jennifer Anderson, Chief Financial Officer, at jennifer@mcclarren.com.

No phone calls or drop ins please!