Client Service Representative Job Description

Centura Wealth Advisory is seeking a Client Services Representative "CSR" to be a key member of our team, providing white glove service to our clients, strategic partners, and our consulting team.

This is an excellent opportunity to work with a small group of experienced financial planners and gain experience in collaborative boutique setting. We focus on each individual's North Star- their goals in life. We champion our employee strengths, guide their development, and invest in their long-term success. We hire driven, optimistic, resourceful, result-oriented, and adaptable people with the desire to help our clients and one another succeed.

Roles and Responsibilities:

The key areas of responsibility include:

1. New Business- Responsible for the opening and funding of new accounts at various custodians
2. Manage new account process from start to finish
3. Existing Business- Responsible for all client service requests at various custodians including account billings, receivables and reimbursements
4. Maintain timely, accurate, consistent documentation of client interactions (meetings, calls), activities, processes, issue resolution and next steps in CRM - ensures action items are prepared and communicated
5. Provide timely communication of any customer dissatisfaction to Relationship Managers
6. Assist with creation of business reports for case management, goal and revenue tracking

Qualifications & Experience:

• Experience & licensing:
- 5 years minimum experience in client service and case management
- Undergraduate degree is preferred
- Series 63 and 65 highly preferred

• Competencies:
- Acts with integrity and must be able to maintain confidentiality
-Displays high level effort and commitment towards performing work
-Accurate, organized and highly detail oriented
-Shows understanding, friendliness, courtesy, tact and empathy to people from various backgrounds
-Strong communication skills

• Software usage & proficiency:
- Microsoft Office: Excel, Outlook, Word, PowerPoint –required
- TD Ameritrade Institutional – Preferred
- Fidelity Institutional – Preferred
- Orion – Strongly Preferred
- Salesforce – preferred

What we provide you:

• Competitive compensation
• Opportunity to contribute to a dynamic, fast-paced business that is experiencing rapid growth
• Open and supportive team-based environment
• Full medical, dental, vision benefits

Centura Wealth Advisory, located in San Diego, is an SEC Registered Investment Advisory firm delivering innovative wealth management services to affluent families, local business owners, and charitable organizations. Our skilled professionals have been crafting sophisticated financial solutions as a team since 2005, yielding total wealth efficiency and purpose to those looking to liberate their wealth.

We achieve this by focusing on our clients' needs, upholding the highest ethical standards, fostering a tradition of quality, and investing in the individuals who, together, form our team. In doing so we cultivate a culture of excellence visible throughout all facets of the company, our practices, and most of all, the work we do for our clients.