## Client Service Specialist

**Starting base $20-26**

**Job Description**

We are a growing multi-advisor wealth management firm located in Vancouver, WA seeking a Client Service Specialist to join our team. We are a small, collaborative office that values professionalism, reliability, kindness, and strong client relationships.

Responsibilities include general office and administrative duties such as answering phones, greeting clients, scheduling, and assisting with day-to-day office operations. The role also includes operational support tasks such as helping onboard new clients, preparing and processing forms, maintaining client records, and entering data into multiple software programs.

The ideal candidate will have a positive attitude, strong attention to detail, excellent organizational skills, and a flexible, team-oriented mindset. They should be adaptable, eager to learn, receptive to feedback, and able to understand the bigger picture of both team and client goals, with a willingness to step in, ask questions, and support the broader needs of the team and client experience.

**Responsibilities**

- Answer phones and greet clients in a professional and friendly manner
- Assist with scheduling and general office administration
- Support client onboarding and account setup and opening processes
- Prepare, review and process paperwork for client accounts and transactions
- Assist clients with ongoing account service needs including money movements, beneficiary updates, address and account registration changes, account transfers, and other account maintenance requests
- Process and track operational paperwork to ensure timely completion
- Enter and maintain accurate client data across multiple systems
- Assist with document organization and filing
- Provide operational and administrative support to advisors and staff
- Communicate with custodians and vendors regarding account servicing requests
- Help maintain an organized and efficient office environment

**Requirements**

- Experience as an office or administrative specialist
- Excellent written and verbal communication skills
- Tech-savvy with the ability to learn new programs quickly
- Proficiency in Microsoft Office (Excel, Outlook, and Word)
- Strong attention to detail
- Accuracy with numbers and data entry
- Excellent time-management skills with the ability to multitask and prioritize
- Willingness to ask questions and seek direction when needed
- Honest, dependable, and professional
- Some college preferred, but not required
- Ability to handle confidential client and financial information with discretion and professionalism
- Willingness to become a Notary Public
- Able to pass background, credit and drug screenings
- Knowledge of retirement accounts, investment accounts, and financial industry terminology is a plus

**Schedule & Work Environment**

- Approximately 24-30 hours per week
- Monday–Friday, generally midday business hours
- This is an in-office position located in Vancouver, WA.
- Remote work is not available for this role.
- We understand that life happens and strive to offer flexibility with scheduling when needed
- 401(k) retirement plan available

**Email resumes to Andrea Silbernagel:**
**asilbernagel@fortvancouverim.com**