



Service Team Associate Job Description - Overview, March 2021

Service Team has career pathing as follows: Service Team Assistant, Service Team Associate, Service Team Coordinator I and II.

Job Description Tasks

- Execution of new client account documents and continued account maintenance while providing excellent, accurate and timely service.
- Deliver a superior level of customer service. Maintain a positive and professional demeanor while acting as the first point of contact for clients, vendors, and visitors in person, online, and via telephone.
- Assist clients with questions and inquiries. Demonstrates critical thinking skills and ability to effectively prioritize and troubleshoot.
- Resolve complex client issues utilizing relevant internal technology solutions to effectively manage client requests, while ensuring client expectations and deadlines are met.

To be successful in this role the individual should enjoy delivering great customer service and managing multiple priorities. Must have attention to detail and organization for client account documentation and follow up. Individual should enjoy establishing a rapport with clients and working with several advisors.

The position is eligible for remote workday after a minimum 90-day training period.

A typical day:

- Working with advisors and clients to support client service inquires and requests.
- Handling account opening paperwork and tracking receipt and completion with clients and our custodian. Completion of account check lists.
- Inputting data in the client relationship management system.
- Preparing for and participating in client meetings.
- Collaborating with service team members on problem resolution and to balance workload.



Projects:

- Create reports from key systems used, downloading them into excel for VLOOKUP, tables, and tracking.
- Supporting key compliance tracking and documentation processes.
- Support advisors in preparing for client and prospect meetings.
- Ongoing update/refresh of procedures.
- Contribute to strategic planning and exchange of ideas to develop enhanced best practices.

Please submit resume to:

Novare Capital Management
Attn. William G. Baynard, Jr
main@novarecapital.com
www.novarecapital.com

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