



525 W. Merrill St.
Birmingham, MI 48009
email info@motivewealth.com
www motivewealth.com

Position Description: Client Service Associate

Motive Wealth:

Motive is a boutique wealth management firm serving a select group of families. We provide financial guidance and investment management within the context of long-term relationships. Ideal new clients have at least \$10 million of investable assets with a minimum of \$5 million with Motive to initiate a relationship.

Client Service Associate:

Our clients rely on us to handle a wide range of administrative requests with speed and accuracy. To support our continued growth, we are adding a Client Service Associate to our team. This is a collaborative, client-facing role. You will work closely with our co-founders and both the advisory and operations teams, with hands-on support and training every step of the way. While you will be a key point of contact for clients, you will always have the full support of the team — we navigate challenges collaboratively, share responsibility, and take pride in doing things the right way.

How to Apply:

To apply, email your cover letter and resume to info@motivewealth.com. Your cover letter will be used to assess your written communication skills. Applications without a cover letter will not be considered. Tell us anything you think we should know about you and include a story, in your style, that reflects your personal definition of “great service.” It can be something you did or something you experienced.

Key Responsibilities:

This role blends client service, operational execution, and internal coordination. You will:

- Act as a primary point of contact for client administrative needs, ensuring timely and accurate responses
- Support account management activities, including onboarding, updates, and documentation
- Coordinate money movement and transaction processing with investment custodians
- Assist with meeting scheduling, preparation, follow-up, and ongoing client communications
- Maintain internal systems and contribute to process improvements
- Collaborate with team members to manage complex tasks and deliver a seamless client experience
- *Note: This is not a sales position. We are seeking candidates who want to grow within client service roles*

Qualifications:

- Bachelor's degree
- 5+ years of experience in a professional environment (financial services preferred)
- Professional presence across all settings—phone, Zoom, in-person, and written communication—our clients expect capable, polished, and respectful interactions

Motive Wealth Advisors is a registered investment advisor with the U.S. Securities and Exchange Commission





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- Proficiency in MS Office; experience with Tamarac, Charles Schwab, Fidelity, and/or Asana is a plus
- Must pass background, credit, and drug screening

Compensation & Benefits:

- This is a full-time position
- Base salary: \$70,000–\$100,000+ (commensurate with experience)
- Discretionary merit bonus
- Health & dental insurance
- 401(k) with 100% match up to 4%, vested immediately (available after 12 months)
- Hybrid work schedule (2–3 days in-office after training)
- 5 weeks of PTO annually, plus stock market holidays and additional time off around year-end holidays

Ideal Candidate:

- **Conscientious** – You take ownership of your work, follow through reliably, and care deeply about getting the details right
- **Self-Starter** – You are proactive, resourceful, and able to move tasks forward independently
- **Detail-Oriented** – You notice what others miss and understand that precision matters, especially in client-facing work
- **Warm and Professional** – You communicate with empathy and polish, whether by phone, email, or in person
- **Team-Oriented** – You collaborate naturally, share responsibility, and support others without hesitation
- **Organized** – You manage multiple tasks and timelines with clarity and calm
- **Discreet** – You understand the importance of confidentiality and handle sensitive information with care

