



## OPPORTUNITY

### Client Service Associate

## WHO WE ARE

Christopher Street Financial (CSF) is a unique, growing financial planning and wealth management firm based in New York City, with clients nationwide. We offer relationship-based financial planning and investment management. Our purpose is to create opportunities through relationships, helping people lead fulfilling lives. We value this for our clients, for our colleagues, and for our community.

Christopher Street Financial was founded in 1981 as the first company committed to providing financial advice and investment services to the LGBTQ+ community. A lot has changed since the birth of Christopher Street Financial, but one thing has not: our commitment to provide financial planning and investment services to the LGBTQ+ community and those who share our values.

We now serve over 420 households and manage over \$900 million in assets. While we are still experts in the unique financial, tax, and legal needs of unmarried couples, as time has gone by, our values and approach to financial planning have resonated with a wider range of people. We provide a welcoming environment where everyone is recognized as an individual with unique needs. By partnering with us as fiduciaries, clients are trusting us with their future and with their peace of mind.

We are an Ensemble Practice, operating as a team that puts our clients and the company before personal interests. Client relationships are relationships of the firm and not of any single advisor. We believe in the efficiency of a common approach and the value of providing a common client experience, all while acknowledging our clients' individuality. We collaborate with one another, combining the strengths of our unique abilities to achieve greatness as a group. We seek to recognize individual efforts based on how they contribute to team success. And together, we are always learning how we can do it all better. This is core to who we are.

## WHO YOU ARE

As a **Client Service Associate** (CSA) at Christopher Street Financial, you will be a critical part of the overall client experience. The CSA is an early career client service position that supports all stages of the client relationship, including account setup, support, and maintenance. You will be responsible for delivering premium client service through direct client communication with clients and coordination with other members of the CSF team, including advisors.

The role is fast-paced, and timely, highly accurate work product is essential. Clear, responsive, and professional communication is also critical.

212 242 2800

475 PARK AVENUE SOUTH, SUITE 2100

NEW YORK, NY 10016

CHRISTOPHERSTREET.COM

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## **DUTIES AND RESPONSIBILITIES**

- End-to-End Account Lifecycle including:
  - New Client onboarding
  - New Account opening
  - Asset transfers (cross-institution)
  - Account contributions and distributions
  - Trade requests
  - Required Minimum Distribution (RMD) processing
  - Beneficiary designations
  - Authorization of Power of Attorney and guardianship designations
- Establish relationships with Broker Dealer, Custodians, and direct business entities
- Customer service through direct Client communication
- Intracompany collaboration with Advisor team
- Workflow and process management
  - Workflow processing
  - CRM data entry and maintenance
  - Process improvement opportunity identification and implementation
- Books & Records maintenance and compliance oversight
- Other responsibilities as assigned

## **REQUIRED SKILLS AND QUALIFICATIONS**

- Bachelor's degree or equivalent work experience. Degree in a business-related field preferred
- Experience working in financial services or investment management industry. Previous experience in a CSA-type role is preferred.
- Experience and comfort in using a range of technology, including CRM and broker dealer / custodial platforms
- Proficiency in Microsoft Office Suite, including Outlook, Excel, and Word
- Excellent time management and organizational skills
- Strong problem-solving skills and a propensity for learning
- Enjoys working "behind the scenes"
- Highly adept at completing multiple, simultaneous tasks expeditiously and accurately with exceptional attention to detail
- Self-starter, with an ability to work both independently and as a team member
- Ability to interpret, adapt and apply with company's policies and procedures



- Ability to communicate clearly and professionally through verbal and written correspondence

## **CORE VALUES**

Team members at Christopher Street Financial:

- Are approachable and even-tempered
- Operate with humility, prioritizing the team
- Are reliable
- Demonstrate initiative with a can-do attitude
- Seek opportunities for growth

## **COMPENSATION AND BENEFITS**

Christopher Street Financial offers market competitive compensation based on professional experience. The salary range for this role in New York City is \$67,000 - \$80,000. In addition, as a valued member of the CSF team, you are eligible for annual incentive compensation tied to your individual contributions to team success and overall firm performance and growth.

Christopher Street Financial values learning and growth. We invest in every team member's professional and personal development. Our Career Tracks provide opportunities for increasing professional responsibility and reward.

We offer the following competitive benefits:

- Hybrid Work (subject to change)
  - Tuesdays, Wednesdays, and Thursdays are in-office
  - Mondays and Fridays are optional work-from-home
- Paid Time Off – 23 days
- Paid Holidays – 10 days based on the NYSE holiday calendar
- Paid Family Leave
- Medical Benefits – 4 options, including a 100% employer-funded option
- Dental Benefits – 3 options, including a 100% employer-funded option
- Vision Benefits
- Health Savings Account (HSA), Flexible Spending Account (FSA), and Dependent Care Flexible Savings Account (DC FSA), and pre-tax Commuting Benefits options
- Group Life and Disability Insurance options
- 401(k) with up to 3% employer match
- Charitable Giving Match – up to \$250 employee-directed
- Education Assistance, for career-aligned training and development



- Additional benefits, including Financial Planning Assistance, Legal Guidance, Estate Guidance, and Identity Theft Assistance

## WHAT COMES NEXT

If interested in pursuing this opportunity, please [click this link to apply](#) or scan the QR code at the bottom of this posting.

CSF is an equal opportunity employer. We are committed to creating a diverse and inclusive company culture, and we do not discriminate against candidates and employees because of their disability, sex, race, gender identity, sexual orientation, religion, national origin, age, veteran status, or any other protected status under the law.

If reasonable accommodation is needed, please contact Mark Lingenfelter, Director of Employee & Client Experience at [mlingenfelter@christopherstreet.com](mailto:mlingenfelter@christopherstreet.com).

