



CLIENT SERVICE ASSOCIATE

WHO WE ARE:

Pathfinder Wealth Advisors LLC, a growing wealth management firm, is seeking an Operations Associate to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

We created Pathfinder Wealth Advisors to meet the unique planning needs of individuals and families. We do the most important thing an advisor can do; we guide clients on the path to a successful life. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

WHO WE WANT:

The Client Service Associate plays a critical role in the back-office functioning of our firm. With the responsibility for the firm's daily operational duties, the Client Service Associate helps keep the office running smoothly and ensures that all client paperwork and processing is handled in a timely, accurate, and professional manner.

WHAT TO EXPECT:

- Processes new accounts.
- Processes account transfers.
- Processes new contributions and redemptions.
- Processes beneficiary changes.
- Creates client meeting update books and reviews.
- Sends update meeting letters.
- Coordinates state, SEC, and FINRA licensing.
- Handles miscellaneous operational activities.
- Develops and maintains written systems of all activities.
- Performs other duties as assigned.

WHAT WE REQUIRE:

- o Excellent attitude and an extraordinary client service orientation with a genuine interest in serving and caring for other people.
- o A strong focus on getting the details right.
- o Excellent organizational and time management skills.
- o An ability to handle multiple tasks within tight time frames.
- o Proficiency with Microsoft Office Suite.
- o Strong analytical and research skills.
- o Strong verbal, written, presentation, and interpersonal communication skills.
- o Interest in and knowledge of financial markets and investment securities.
- o Previous securities industry experience.
 - o Attendance is an essential function.
 - o Salary is commensurate with experience.

This can be a full-time position or a minimum of 25 hours per week. Hybrid model work environments; three days in office, two days work from home.

In exchange for your expertise, we offer a base salary, bonus potential, 401(k) plus matching, health care reimbursement account, a potential for career growth, and a great working environment. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational and focused on healthy living. Smokers need not apply. For more information about our company, please visit our website { www.pathfinder-wealth.com }.

If you are interested in this opportunity, please send your resume and letter of interest to josephine@pathfinder-wealth.com / 216-533-0463. Our website is pathfinder-wealth.com

We are an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status, or any other characteristic protected by law.