

Position Title: Advisor Support Associate
Position: Colorado Springs, CO
Employment Type: Full Time
Hours: Monday-Friday; 8:00am - 5:00pm MST



www.marathonwps.com

The Opportunity: As an Advisor Support Associate, you will play a key role in delivering a seamless, high-quality experience for both clients and advisors. This position is responsible for managing the full lifecycle of client accounts, from onboarding and account maintenance to money movement and ongoing service support, ensuring all requests are handled accurately, efficiently, and in compliance with industry standards. You will work closely with advisors, custodians, and clients to coordinate account activity, resolve issues, and support important processes such as distributions and estate-related requests. This is a hands-on role ideal for a detail-oriented professional who takes pride in ownership, thrives in a collaborative environment, and is committed to providing exceptional client service.

About Us: At Marathon Wealth & Protection Strategies, we believe financial planning should feel personal. We help individuals, families, and businesses navigate important financial decisions through customized planning, investment guidance, and retirement strategies designed around their goals. As a relationship-focused advisory firm, we take pride in providing exceptional service, building lasting client relationships, and working together as a team to deliver meaningful outcomes. Joining Marathon means becoming part of a collaborative culture where your work directly impacts the financial confidence and well-being of the clients we serve.

Key Responsibilities:

- Serve as a primary point of contact for clients by answering incoming calls, assessing needs, communicating relevant information to advisors.
- Assist with client meeting coordination and assist with preparation and follow up including gathering data, preparing paperwork, etc.
- Facilitate the onboarding of investment clients by coordinating the new account opening process from beginning to end, including the collection of necessary documentation, and liaising with broker dealer, Wealth Advisors, and clients to ensure accurate setup of investment accounts.
- Handle routine client account maintenance items, such as processing name and address changes, bank authorizations, and responding to client queries or issues.
- Assist with client service items like beneficiary distributions and settling estates.
- Execute money movement and asset transfers as directed including client deposits, rollovers, withdrawals, and internal transfers while adhering to regulatory requirements and internal policies, utilizing security trading platforms such as Pershing (NetX360)
- Coordinate annuity applications and ongoing service requests, including paperwork
- Maintain client information and notes in Redtail (CRM).
- Assist with Required Minimum Distributions (RMDs) and Qualified Charitable Distributions (QCDs)
- Follow up with vendors, product sponsors, insurance firms, and custodians for documentation or inquiries on behalf of clients and/or Financial Advisors.
- Coordinate the procurement of client gifts, cards, and flowers to acknowledge milestones and life events.
- Other duties as assigned.

Qualifications:

- Minimum of 2 years of client service, operations, or administrative experience in wealth management
- Familiarity with Pershing (NetX360), Redtail, Assetmark, eMoney, MoneyGuidePro preferred
- Ability to work independently with a high degree of self-direction and adaptability, proactively managing multiple tasks and promptly addressing client needs.
- Excellent organizational and problem-solving skills, with exceptional attention to detail and follow-through.
- Proficiency in computer applications such as Adobe Acrobat Pro and Microsoft Office Suite (Windows, Word, Excel, PowerPoint).
- Strong work ethic, punctuality, dependability, and professionalism
- Collaboration skills and the ability to thrive in a team-oriented culture.
- Maintains high ethical standards and confidentiality, exercising discretion when handling sensitive information.
- Outstanding interpersonal, written, phone, and email communication skills.

Position Details:

- Onsite role: Colorado Springs office
- Benefit Eligible: Paid vacation, sick, and holiday hours
- Opportunities for professional growth and development
- A supportive and inclusive work environment where your contributions are valued.