AVISO FINANCIAL
www.avisofinancial.com

Position Title: Client Service Associate
Location: Anchorage, AK
Position: In Office
Employment Type: Full Time; 40 hours; Monday-Friday

Overview:
As a Client Service Associate, you will be the first point of contact for our clients, delivering exceptional administrative support to ensure a seamless and personalized client experience. This role involves coordinating and organizing client meetings, processing account paperwork, and assisting in implementing advisor recommendations, playing a vital role in maintaining client satisfaction and the success of financial plans. You will follow established procedures for routine tasks while also handling a variety of non-routine tasks with general guidance. Regular interaction with internal and external representatives or clients is essential to obtain, clarify, or provide necessary information.

About Us:
At Aviso Wealth Management, we create a supportive and collaborative environment where employees can grow and make a real impact. We focus on understanding and meeting our clients' unique needs, and we value your fresh perspective and enthusiasm. Our team has several offices serving local communities across the US, and together, we change lives and help people achieve their financial goals.

Job Responsibilities:

- Interact daily on the phone and in person with prospective and existing clients, handling basic inquiries while providing support to clients and advisors.
- Coordinate, schedule, confirm, and organize client meetings, facilitating both in-person and online appointments, and assisting with notetaking and data collection as necessary.
- Execute administrative and support functions, complete, process, and monitor new account and insurance paperwork, signature collection, data entry into processing systems, payment processing, digital file maintenance, report generation, and document uploading.
- Handle routine client account maintenance items, such as processing name and address changes, bank authorizations, and responding to client queries or issues.
- Process and follow up on client documentation for proper maintenance of accounts.
- Organize, manage, and track multiple detailed tasks and assignments with frequently changing priorities and deadlines in a fast-paced work environment.
- Maintain databases and create reports using portfolio software programs.
- Follow up with vendors, product sponsors, and partners for documentation or inquiries on behalf of clients and/or advisors.
- Other duties as assigned.

Qualifications:

- Minimum 2 years of experience in a client support or administrative role, preferably within financial services or wealth management
- Preferred or willingness to pursue: FINRA Series 6 or 7.
- Familiarity with Redtail or similar CRM preferred.
- Excellent attention to detail, multi-tasking, and time management skills.
- Professional demeanor and strong interpersonal skills to effectively engage with clients and team members.
- Excellent follow-up skills with a proactive approach to tasks and responsibilities.
- Ability to work independently and as part of a team.

- Demonstrates initiative, identifying areas for improvement and taking steps to address them effectively.
- Strong written and verbal communication skills.
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and other office tools.
- Must have a high willingness to learn new concepts, processes, and software and be a team player.

Additional Details:

- Full Time; 40 hours per week
- Onsite role at Anchorage, AK office.
- Benefits Eligible: Group health plan, 401(k) retirement plan with employer match contribution, Paid vacation, sick, personal, and holiday hours.
- Employment background and fingerprinting checks required due to regulatory compliance.
- Opportunities for professional growth and development, including continuing education.