

Firm: Artisan Cap
Job Title: Client Relations Associate
Location: Encino, CA
Job Type: Full-Time, In Office
Hours: Monday-Friday; 8am-5pm
Compensation: \$65,000 – \$75,000 (DOE) + Benefits



www.artisancap.com

Job Summary: This role supports our Financial Advisors by helping deliver a high-touch, personalized service to clients. The Client Relations Associate will serve as a critical support in building and maintaining client relationships. This role is central to how we engage with clients and will suit someone who is detail-oriented, proactive, resourceful, and dependable. The Client Relations Associate will own daily operations tasks, assist with client management and financial planning support.

About Us: Artisan Cap is a boutique wealth management firm with roots dating back five decades and is focused on helping clients build and preserve multi-generational wealth. We combine thoughtful financial planning with personalized service to create long-term relationships built on trust.

Key Responsibilities:

- Act as a primary point of contact for client requests and inquiries
- Manage client onboarding, ensuring accurate and timely account setup
- Facilitate account maintenance (updates, transfers, etc.)
- Execute money movement (deposits, rollovers, withdrawals) in compliance with firm and regulatory standards
- Prepare and process paperwork with a high level of accuracy
- Coordinate client meetings, prepare agendas and supporting materials
- Assist in creating client presentations and reports
- Maintain client records in CRM systems (Redtail)
- Partner with advisors to ensure a seamless client journey
- Help plan and execute client events and appreciation initiatives
- Coordinate client gifts and milestone recognition to enhance relationships
- Other duties as assigned

Qualifications:

- Minimum 3 years client support, operations, or administrative experience in the financial services industry.
- Familiarity with CRM (Redtail), eMoney, Docupace, or NetX360 (Pershing) preferred.

- Professional demeanor with strong communication and interpersonal skills to effectively engage with clients and team members.
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and other office tools.
- Excellent organizational skills with keen attention to detail.
- Ability to multitask and prioritize workload effectively.

Why This Role: If you enjoy building relationships and managing details with precision, this role offers you the opportunity to contribute to a respected wealth management team where your work truly makes a positive impact.

Position Details:

- Full-time, Onsite role at our Encino office
- Benefits Eligible: Group health, vision, dental, 401K retirement plan with employer match, life and disability insurance, paid vacation, sick days, and holidays
- Employment background and fingerprinting checks required due to regulatory compliance
- Opportunities for professional growth and development
- A supportive and inclusive work environment where your contributions are valued