NEWASPECT
FINANCIAL SERVICES, LLC.

www.newaspectfs.com

Position Title: Client Services Associate
Location: Novato, CA
Position: In Office
Employment Type: Full Time; 40 hours; Monday-Friday

Overview:
The Client Services Associate (CSA) is essential for ensuring high client satisfaction through exceptional service and efficient handling of operational and administrative tasks. This role involves managing client requests, paperwork, and account transactions through direct client interaction and coordination with team members. Strong communication skills, attention to detail, and a proactive attitude are crucial for success in this position.

About Us;
New Aspect Financial Services provides a comprehensive suite of financial and retirement planning services tailored to individuals, families, and corporate clients. Their offerings include customized solutions for retirement programs, investment planning, estate planning, risk management, and employee benefits. The firm is dedicated to delivering superior, competent services with a focus on client success and integrity.

Job Responsibilities:
- Support high client satisfaction rates through excellent customer service, prompt follow-up to client inquiries, and proactive problem-solving skills
- Monitor and process client requests and prepare paperwork including, but not limited to, opening new accounts, closing accounts, insurance applications, transferring assets, deposits, withdrawals, account title changes, address changes, etc.
- Assist with the client onboarding process
- Manage client Required Minimum Distribution (RMD's) report
- Send requested documentation to clients regarding account activity
- Provide new users/clients with technology assistance and training, as needed
- Participate in client meetings as needed
- Track all client updates and interactions in CRM (Redtail), as well as assign and complete client-related tasks in CRM via Workflows
- Work with the team to address workflow issues as needed
- Prepare client review materials and ensure that data required for review is accurate
- Work seamlessly with broker dealer to handle client service requests, escalating issues when appropriate and making suggestions for improvement to their systems and processes
- Maintain physical and electronic client files
- Receive and distribute mail, packages, and confidential documents.
- Coordinate client gifts, cards, and flowers to acknowledge milestones and life events.
- Other duties as assigned

Qualifications:
- Minimum 2 years of operations, customer support, or administrative experience
- Experience in wealth management or financial experience preferred.
- Familiarity with eMoney, Pershing (NetX360), Assetmark, Redtail preferred.
- Ability to work independently with a high degree of self-direction and adaptability, proactively managing multiple tasks and promptly addressing client needs.
- Strong problem resolution skills
- Detail-oriented with a high degree of accuracy
- Exceptional organizational skills: ability to multi-task and follow up to meet deadlines

- Highly competent computer skills and advanced knowledge of Microsoft Office Suite (Word, Excel, PowerPoint, Outlook), Zoom, Adobe Acrobat, RingCentral, Calendly
- Exceptional oral, written, and interpersonal communication skills
- Impeccable ability to maintain confidentiality and integrity
- Energetic, eager to learn, and willing to cooperate in a team environment as a team player

Additional Details:

- Full Time; 40 hours per week
- In office role 5 days in office at Novato Office
- Benefits Eligible:, 401(k) retirement plan with employer match contribution, Paid vacation, sick, personal, and holiday hours, health care stipend
- Long-term career growth opportunity for the right candidate to potentially transition into other roles within the firm with an established team of Fiduciary Advisors.