BECKER WEALTH MANAGEMENT
www.beckerwealthmanagement.net

Position Title: Client Service Manager
Location: Paoli, PA
Position: In Office – Potential Hybrid Schedule
Employment Type: Full Time; Monday-Friday 9am-5pm

Overview:
As a Client Service Manager, you will play a vital role in delivering an exceptional client experience and supporting the operational success of our firm. This dynamic position involves direct interaction with clients and the President/Lead Financial Advisor, ensuring timely and accurate handling of client inquiries, account servicing, and investment onboarding. You will coordinate client meetings, manage documentation, and facilitate money movement and asset transfers in accordance with regulatory standards. Additionally, you'll support financial planning processes, assist with compliance tasks, and oversee day-to-day office operations. This role is ideal for someone who is detail-oriented, client-focused, and thrives in a fast-paced, collaborative environment.

About Us;
Becker Wealth Management is an independent, full-service advisory firm dedicated to helping individuals, families, and business owners make confident, informed financial decisions. Our team brings a thoughtful, cross-functional approach to planning; which includes coordinating strategies, simplifying complexity, and supporting every aspect of our clients' financial lives. We pride ourselves on listening first, understanding what matters most, and delivering personalized guidance rooted in integrity and professionalism. If you're passionate about meaningful client relationships and high-quality financial advice, you'll feel right at home here.

Job Responsibilities:
- Provide exceptional client service by promptly responding to client inquiries, resolving account-related issues, and addressing client requests for information or assistance.
- Coordinate and follow up from client meetings, facilitating both in-person and online appointments with the Financial Advisor. Includes coordinating and reviewing prepared materials for client meeting completed by planning team.
- 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 product partners, Financial Advisors, and clients to ensure accurate setup of investment accounts.
- 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.
- Follow up on outstanding paperwork and data work requests promptly.
- Monitors system alerts for any potential and ongoing issues and takes actions to clear back logs and escalating when required.
- Follow up with vendors, product sponsors, and partners for documentation or inquiries on behalf of clients and/or Financial Advisors.
- Manage the workflows and complete tasks as assigned
- Plan and organize occasional client and company events/workshops, including venue bookings, catering arrangements, and guest list. Could also include content organization and preparation.
- Initiate and support marketing efforts through social media, email and mail outreach.
- Assist with client service items like beneficiary distributions and settling estates.

- Manages office; including performing payroll, paying invoices, and ordering supplies.
- Other duties as assigned.

Qualifications:

- Minimum 3 years of experience in a client support or operations role within financial services or wealth management
- Familiarity with Pershing (NetX360) 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, Teams), Zoom, Adobe Acrobat,
- 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 at Paoli Location
- Benefits Eligible: Health Care – Medical, Vision, Paid Time Off
- Opportunities for professional growth and development; including continuing education.
- A supportive and inclusive work environment where your contributions are valued.