Position Title: Client Services Associate
Position: Onsite - Portland Office
Employment Type: Full Time
Hours: Monday-Friday; 8am-5pm PST

Cascadia
WEALTH ADVISORS
www.cascadiawealthadvisors.com

The Opportunity: As a Client Service Associate at Cascadia Wealth Advisors, you'll facilitate the onboarding of investment clients, coordinate new account openings, execute money movements and asset transfers. Additionally, you'll handle routine maintenance tasks and provide exceptional client service. This integral position encompasses a wide array of administrative and support responsibilities in direct collaboration with our Financial Advisors, Client Services Manager, and our valued clients.

About Us: Cascadia Wealth Advisors was founded with a deep-rooted passion for community and empowering individuals to achieve their financial aspirations. Based in Portland, Oregon, we are dedicated to delivering personalized service, fostering genuine relationships, and providing meaningful financial guidance. Our team takes pride in supporting and recognizing outstanding members who contribute to our growing enterprise. Visit our website here.

Key Responsibilities:

- 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.
- Assist with client service items like beneficiary distributions and settling estates.
- Handle routine maintenance like name or address changes and bank authorizations.
- 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) and National Financial (Wealthscape).
- Maintain client information and notes in Redtail (CRM).
- Coordinating annually with clients to gather financial documents and update information in financial planning software such as Right Capital.
- Provide exceptional client service by promptly responding to client inquiries, resolving account-related issues, and addressing client requests for information or assistance.
- Assist advisor with RegBi documentation follow up tasks.
- Contribute to the development and enhancement of operational processes and procedures.
- Other duties as assigned.

Qualifications:

- Minimum of 3 years of operations, financial planning, registered assistant, or related experience in wealth management.
- Familiarity with security trading platforms such as Pershing and National Financial preferred
- Familiarity with RedTail and Right Capital is a plus.
- 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, CRM systems, 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:

- Benefit Eligible: Group health, vision dental plans, 401k retirement with employer contribution, Paid vacation, sick, and holiday hours
- Opportunities for professional growth and development; including continuing education.
- A supportive and inclusive work environment where your contributions are valued.