Client Service Associate (Sandy Springs area)

The firm is an independent, fee-only wealth management and financial planning firm headquartered in Sandy Springs. They serve individuals and families with personalized financial advice and investment services.

We are seeking a highly organized, proactive, and client-focused Client Service Associate (CSA) to serve as the client service guru of our advisory team. This role is ideal for someone who loves details, thrives on follow-through, and takes pride in creating a seamless experience for both clients and advisors.

The CSA plays a critical role in supporting advisors, managing day-to-day client service tasks, and ensuring our firm operates efficiently and professionally. You will be a key point of contact for clients and a trusted partner to the advisory and operations teams.

Key Responsibilities

Client Service & Relationship Support

- Serve as a primary point of contact for clients, ensuring timely, friendly, and professional communication
- Assist with client onboarding and account maintenance paperwork (Schwab, custodial forms, updates, transfers)
- Track client service requests and ensure resolution in coordination with advisors and operations
- Help maintain a consistent, high-touch client experience that encourages long-term relationships and referrals

Client Administrative Assistance

- Assist with special projects, events, and firm initiatives as needed
- Calendar management, Zoom meeting tracking, and other administrative tasks for the leadership team

CRM & Systems Support

- Update and maintain accurate client records in Wealthbox CRM
- Track tasks, workflows, and follow-ups to ensure nothing falls through the cracks
- Support documentation of repeatable processes and procedures
- Help ensure data accuracy across custodial and planning platforms

Advisor & Team Support

- Proactively anticipate advisor needs related to meetings, paperwork, and client requests
- Collaborate closely with operations and compliance teams to support firm workflows

Ideal Candidate Profile

You may be a great fit if you are:

- Exceptionally organized and detail-oriented
- Comfortable juggling multiple priorities and deadlines
- Professional, warm, and confident in communicating with clients
- Tech-savvy and quick to learn new systems
- Proactively; you don't wait to be told what needs to be done
- A team player who takes pride in supporting others

Preferred Qualifications

- 2+ years of experience in client service or financial services support role
- Experience with CRM systems (Wealthbox a plus)
- Familiarity with custodians (Schwab preferred)
- Strong written and verbal communication skills
- Experience in wealth management family office

Why Join Us

- Work with a collaborative, growth-oriented advisory team
- Meaningful client relationships and visible impact on the firm
- Opportunity to grow professionally within a well-structured organization
- Supportive culture that values excellence, accountability, and care
- This is a unique opportunity to join a fast-growing RIA where you will gain broad exposure across multiple areas of the firm while stepping into a role designed to evolve in responsibility and career growth as the firm scales.

Please contact Jackson Cown with any questions or interest at jackson@scconsultingsvcs.com