**Client Service Associate  
  
Job Summary**Under direct supervision, uses attention to detail and interpersonal skills to assist Financial Advisors and provide clients with quality service. Follows established procedures to perform routine tasks and receives general guidance and direction to perform a variety of non-routine tasks with limited decision-making responsibility. Routine contact with internal and external clients is required to obtain, clarify or provide facts and information.  
  
**Essential Duties and Responsibilities**

* Interacts daily on the phone and in person with prospective and existing clients including handling basic inquiries.
* Researches client and security information through the back-office system.
* Processes and follows up on client documentation for proper maintenance of accounts.
* Prepares letters, forms, and spreadsheets to assist with servicing existing clients and onboarding new clients.
* Creates and maintains records and files.
* Ensures required client paperwork is current with firm and industry requirements, rules and regulations.
* Maintains databases and creates reports using portfolio software programs.
* Assists Financial Advisors with marketing efforts including seminars, etc.
* Receives and processes securities and checks.
* Receives cross-training and assists with other operational functions as required.
* Performs other duties and responsibilities as assigned.

**Qualifications**

* General office practices, procedures, and methods.
* Operating standard office equipment and using required software applications to produce correspondence, reports, electronic communication, spreadsheets, and databases.
* Using analytical skills, research client account questions.
* Organize, manage, and track multiple detailed tasks and assignments with frequently changing priorities and deadlines in a fast-paced work environment.
* Use appropriate interpersonal styles and communicate effectively, both orally and in writing, with all organizational levels.
* Use mathematics sufficient to process account and transaction information.
* Work independently.
* Provide a high level of customer service.

**Educational/Previous Experience Requirements**

* Bachelor’s Degree
* One (1) or more year’s securities industry or related work experience preferred.

**Licenses/Certifications**

* None required.

If you think this is a good fit, send us your resume and tell us why at [NewHireACU@gmail.com](mailto:NewHireACU@gmail.com).

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