We are hiring a Wealth Client Service Specialist. This position is responsible for serving as a primary service resource for Austin Asset clients and as a liaison for employee and custodial accounts, ensuring responsiveness and accuracy on work performed, serving as a liaison for services, programs, and department to support the overall mission of the organization.

Essential functions of the role:

- Cultivates client service operations while serving as a liaison for the Client Services team and employees at large.
- Comprehend “the big picture”; become a firm resource for practical client service solutions; demonstrating strong problem solving and “out-of-the-box troubleshooting skills.
- Demonstrate excellent written and verbal communication skills; serve as primary point of contact for assigned clients, client related issues, and client services team.
- Manage ultimate accountability to clients through proactive actions and accurate outcomes.
- Demonstrate ability to onboard new clients, resolve client issues, unwind estates, complex account opening and transfers with all custodians; training others along the way.
- Demonstrate effective time management of workload with ability to prioritize; develop supervisory skills.
- Actively participate in professional development, including education and training; serve as a liaison for the firm.
- Contribute to revenue growth by communicating new opportunities for unmanaged assets to wealth management and wealth planning team members**.**
- Demonstrate a clear understanding and adoption of the company’s culture; exemplifies the company’s culture completely; acts as a mentor to newer associates.

Required Qualifications:

- Bachelor’s degree or 5+ year’s experienced in a client service role in the industry.
- Minimum of 6 years of industry related experience.
- Very strong working knowledge of financial investment concepts and practices, as evidenced by advanced financial training, education, or relevant experience.
- Excellent analytical and quantitative skills.
- Excellent customer service and customer retention skills.
- Strong written and verbal communications skills, with customer focus.
- Strong working knowledge of Microsoft Office Suite (Outlook, Word, Excel).
- Comfortable and effective in a dynamic, flexible work environment requiring high degrees of accountability and self-motivation.

What Austin Asset has to offer you:

- Paid time off- 27 days annually, accrued per pay period
- Personal Volunteer time - 2 Volunteer days, volunteer for a non-profit organization of your choice
- Holiday, Bereavement, Civic Duty, Military Leave paid time off
- Sabbatical leave eligible after 10 years of service
- Maternity/Paternity/Adoption 10 weeks paid leave
- 100% of health benefits covered by the firm (PPO/HSA & FSA)Health Benefits:

    Medical Insurance (* PPO /*HSA & FSA), Group Term Life & AD&D Insurance*, Voluntary Life Insurance, Short & Long Term Disability, Employee Assistance Program (EAP)
- 401(k) Plan - 3% Company Safe Harbor match regardless of the employee participation level
- Various Bonus Opportunities: Quarterly Organizational Bonus – Based and Performance Bonuses
- Lifetime Learning: Career Development, Career Advancement, and Ownership Plan

- Monthly social events and milestone gatherings put on by our Culture Club
- Gourmet coffee, teas and healthy snacks stocked weekly
- Flexible Work Schedule, 50% Work from Home/Office
- Dynamic, collaborative, and fun culture!