**Bare Wealth Advisors**

**Position Description**

**POSITION TITLE:** Client Services Associate

**POSITION SUMMARY:**

The Client Services Associate is a client focused position dedicated to enhancing customer satisfaction and providing exceptional client service. The Client Services Associate is an integral part of the Bare Wealth team and works to support the advisor by servicing the client relationship in account paperwork and account maintenance.

**RESPONSIBILITIES:**

* Prepare and process account paperwork.
* Complete account maintenance paperwork for existing accounts: RMDs, QCDs, monthly investments, monthly withdrawals, bank account changes, donor advised funds gifting, beneficiary updates, trusted contacts, etc.
* Process and track incoming transfers, checks and deposits.
* Follow up with clients verbally and/or in writing to obtain required information needed for paperwork preparation and processing.
* Scan any documents provided by client during meetings and/or received in the office.
* Assist with Bare Client Hub log in issues.
* Maintain electronic files.
* Update and maintain CRM.

**REQUIREMENTS**

* At least 2 years of administrative experience
* Knowledge of office management systems and procedures.
* Excellent time management skills
* Ability to handle frequent interruptions.
* Ability to prioritize tasks in order of importance and urgency.
* Attention to detail and problem-solving skills.
* Strong organizational and planning skills.
* College degree preferred, but not required.
* Industry experience preferred, but not required.

**EXPERIENCE AND SKILLS**

* General computer skills necessary.
* Organizational skills.
* Skill in effective verbal and written communications.
* Skill in utilizing Microsoft Word and Outlook.
* Self-motivated with a desire to complete work with excellence.
* Strong interpersonal skills and ability to interact and make clients feel welcome and valued.

**BENEFITS**

* Health Insurance
* Dental Insurance
* Vision Insurance
* Short & long-term disability insurance, upon eligibility
* 401(k) plan, upon eligibility
* Vacation/holiday time

**ABOUT BARE WEALTH ADVISORS**

Bare Wealth Advisors is a financial planning and wealth management firm based in Gap, PA. We advise our clients to intentionally manage wealth in a way that aligns with their God-given purpose for maximum impact. Please visit us at www.barewealthadvisors.com to learn more about our firm.