Client Service Associate

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

Job Responsibilities:

- Provide non-advice related support to clients.
- 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 clients during meetings and/or received in the office.
- Assist with Financial Website log in issues.
- Set up paperless delivery for Charles Schwab accounts.
- Set up new accounts in appropriate financial systems and communicate with advisor/client.
- Set up and maintain electronic client files.
- Update and maintain client CRM.
- Track RMD and QCDs.
- Enter Client PDF documents into client CRM.
- Update client CRM Profile Forms after meetings.
- Work with the SPA and advisor within your team.
- Assist with projects as needed.
- Respond to administrative client queries in a timely fashion.
- Review account alerts and action needed (NIGOs) for Schwab accounts daily.
- Run a transfer/ACH/check deposit report daily (ensure invest tasks are set).

Knowledge, Skills & Qualifications:

- Undergraduate college degree or comparable work experience.
- Excellent verbal and written communication skills.
- Strong analytical and problem-solving skills.
- Strong organizational and time management skills including the ability to manage multiple tasks with a high attention to detail and follow-through.
- Basic knowledge of Microsoft Office required.

About Bare Wealth Advisors

Bare Wealth Advisors offers a tailored approach to holistic wealth advising and management. Our mission is to advise our clients to intentionally manage wealth that aligns with their God given purpose for maximum impact. We believe that through this intentional stewardship and extravagant giving, we can help people shift the culture and change the world for the glory of God.