HIGHTOWER

Title: Client Service Associate
Location: Alpharetta, GA
Scope: Full-time
Structure: Report to Lesley Murray

Our Story

Founded in 2008, Hightower is a wealth management firm that provides investment, financial and retirement planning services to individuals, foundations and family offices, as well as 401(k) consulting and cash management services to corporations. Hightower's capital solutions, operational support services, size and scale empower its vibrant community of independent-minded wealth advisors to grow their businesses and help their clients achieve their vision of "well-th. rebalanced." Based in Chicago with advisors across the U.S., the firm operates as a registered investment advisor (RIA).

Your Future Team

Bluerock Wealth Management is a fiduciary fee-only firm. Our comprehensive approach covers the full spectrum of wealth management, including investing, financial planning, and tax mitigation. We employ a holistic, data-driven and inclusive approach. We are looking for a Client Service Associate who exhibits these qualities:

- **Client Service.** Client relationships are what make our business successful. Experience in delivering proactive, client-focused solutions in a timely manner is a must. Quick and accurate follow up to client and colleague requests is essential.
- **Clear Communicator.** Demonstrable ability to communicate with clients. Capability to be a team player working together with colleagues toward the goal of maintaining a positive firm culture.
- **Adaptable.** You have the instinctive need to achieve objectives despite the hurdles that may come along the way. You are comfortable working in a fast-paced environment and are adaptable to constant change.
- **Highly organized.** You know how to manage multiple projects and prioritize appropriately. You create clear and logical systems and processes to support your work and that of the organization.

What You'll Do

*We are seeking a successful **Client Service Associate** who is a multi-tasker at heart, with strong communication skills and a problem-solving mindset that thrives in a fast-paced and evolving organization. Our ideal candidate is coachable, has a willingness to learn, and consistently performs at a high level under variable workloads. As a rapidly growing company, opportunities for internal growth and career development are plentiful.*

- Provide top quality service to clients and complete administration of client financial accounts and associated money movement
- Prioritize and organize workflow, as well as corroborate all facets of the operation and administration of client accounts
- Onboard new clients – drafting welcome emails and updates on progress to new clients
- Ability to respond professionally to client and internal questions regarding accounts, policies, and procedures

- Review daily activity and reconcile current client activity, fund transfers and previous day's activity to ensure accuracy
- Process client requests (wires, checks, journals, etc.)
- Offer administrative and office management support to the team
- Assist with establishing online access for statements, confirms, tax documents and other services
- Maintain client electronic files

What You'll Bring

The candidate should have strong professional verbal and written communication, and interpersonal skills, as well as the ability to motivate self and others to deliver high quality output, possibly within tight timeframes.

The ideal candidate will have experience and attributes in the following areas:

- Strong interpersonal skills and an innate ability to build immediate rapport with personnel and clients.
- Solid understanding of advisor needs; experience in delivering client-focused solutions.
- Demonstrable experience in developing efficient strategies to "power" complex and diverse advisor practices.
- 1-3 years of experience in Financial Services
- Previous work experience, including internships involving client service or financial analysis, is preferred.
- BA/BS degree in finance or related field preferred
- Experience in MS Office applications, such as Word, Excel, PowerPoint, etc.
- Detail-oriented with ability to prioritize and organize workflow
- Ability to acquire a working knowledge of the portfolio of accounts
- Self-starter and able to work independently
- Superior interpersonal, organizational and client service skills
- Ability to work effectively in a team environment
- Flexible and willing to perform other tasks as assigned

What We Offer

- Coverage on the first day of employment for medical, dental, and vision insurance
- 401k Matching Plan
- Paid Parental Leave
- Student Loan Assistance
- Pet Insurance
- Flexible Benefits (FSA, Pre-tax transportation, HSA Employer Contributions)
- Remote and or hybrid depending on location

AN EQUAL OPPORTUNITY EMPLOYER: Hightower is an equal opportunity employer and does not discriminate based upon race, color, religion, sex, sexual orientation, pregnancy, marital status, national origin, citizenship, veteran status, ancestry, age (over 40), physical or mental disability, medical condition (cancer-related), gender identity or expression, genetic information including sickle cell or hemoglobin C trait, or any other consideration made unlawful by applicable federal, state, or local law.

You are a U.S. citizen, U.S. permanent resident or possess other unrestricted U.S. work authorization and will not require sponsorship for U.S. work authorization now or anytime in the future.

Hightower requires proof of COVID-19 vaccination for all employees. Reasonable accommodations will be considered. If an employee is unable to provide proof of vaccination, mask coverings and weekly COVID-19 testing will be implemented.