



**Job Title:** Client Service Support Specialist

**Reports To:** Managing Partner- Client Service

**Summary:** Responsible for supporting Client Advisors by performing the following duties.

**Duties and Responsibilities** include the following. Other duties may be assigned.

- Work closely with client advisors to support client relationships.
- Coordinate all client on-boarding including preparation of account paperwork, account opening, overseeing transfers and ensuring all supporting documentation is compliant.
- Manage all cash transfer needs including daily and periodic wires, ACH payments, and IRA contributions/distributions.
- Assist client advisors with scheduling appointments and making travel arrangements.
- Monitor and handle administrative client service issues ensuring the highest level of client satisfaction.
- Work with client advisors to prepare for ongoing performance reviews.
- Maintain client files including scanning, filing and maintaining appropriate documents per the firm's compliance standards.
- Assist in the development of marketing tools including pitchbooks, newsletters, and email blasts.
- Assist in implementation and ongoing maintenance of CRM database.
- Help coordinate all firm client events.

**Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Computer Skills:**

To perform this job successfully, an individual should be proficient in Microsoft Office, Tamarac Performance, and Fidelity Wealth Central.

**Education/Experience:**

Bachelor's degree (B. A. / B. S.) from four-year college or university. Minimum of two years of relevant experience in the RIA, broker-dealer or financial services industry.

**Knowledge, Skills, and Other Abilities:**

- Computer skills
- Time management skills
- Organizational skills
- Oral and written communication skills
- Detail Oriented
- Project management skills
- Professional

*To apply, please submit a cover letter and resume to [Leila.evans@queens-oak.com](mailto:Leila.evans@queens-oak.com).*