Position Description

Title: Client Services Support

Reports to: Client Services Manager

Salary Range: $55,000-$70,000 annually with potential for annual bonus based on firm profitability and employee performance.

Benefits:

- Medical, Dental, and Vision insurance: 80% employer paid premiums for employee and 50% employer paid premiums for dependents. Two plan options: High deductible with HSA and low deductible plan.
- 100% employer paid premium for Group Term life, voluntary employee paid life and AD&D Insurance.
- 401(k) with 100% company match up to 4% with both Traditional and Roth options.
- Voluntary long-term Disability Insurance.
- Paid time off: 17 days annually for new hires, two half-days per month, 10 holidays plus 1 floating holiday, birthday leave, bereavement leave, 16 hours per year of volunteer leave.
- 100% remote work schedule.
- Certification and designation sponsorship, tuition reimbursement up to $5000 annually.
- Additional benefits: fitness membership reimbursement, internet reimbursement, one month paid sabbatical after 5 years of employment, employee home loan program, donation matching, recognition program, employee referral bonus, and company events.

NWAM, LLC dba Northwest Asset Management is committed to fostering, cultivating, and preserving a culture of diversity and inclusion. Diverse and inclusive teams have a positive impact on the services we provide our clients and advisors. We embrace and encourage our employees' difference in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique. Military veterans and spouses are highly encouraged to apply.

NWAM, LLC dba Northwest Asset Management is an SEC Registered Investment Adviser.

Job Summary

The Client Services Support individual will assist the Back Office Support Team with various administrative tasks, client accounts, account openings, and procedures. The candidate will work closely with Client Services Associates and advisors to ensure all work is thoroughly completed with minimal errors. This position will use a variety of computer programs including CRM, Microsoft Office, and custodian platforms.

Requirements and Qualifications

- Bachelor's degree from an accredited college or university.
- 2+ years in the investment or finance industry required.
- Securities Industry Essentials exam, required within 6 months following date of hire.
- Solid strategic thinker and problem solver
- Strong organizational and project coordination skills with the ability and experience to handle and prioritize multiple assignments and conflicting deadlines, while providing a high level of client service
- Ability to work effectively under pressure with tight deadlines, with attention to detail, and the ability to handle conflict and negotiate resolution
- Ability to be responsible for confidential and time sensitive material
- Proficiency with windows-based software (e.g. Word, Excel, and PowerPoint) and Outlook is required
- Excellent written and verbal communication skills – clear, concise, and organized
- Ability to work in a team-based environment, proactively covering and sharing task responsibilities with other team members
- Be self-motivated, show initiative and creativity in all aspects of work (e.g. creating new methods to streamline tasks)
- Work independently with little supervision and knows when to ask for guidance, clarification, assistance
- Possess a high level of professionalism, confidentiality, discretion, and judgment
- Team player, with strong coaching and listening skills
- Desire/ability to work successfully in a small company environment

Duties and Responsibilities

The Client Services Support individual can expect to focus in the following areas:

- Assists Back Office department and Client Services team with various tasks.
- Prepare and track account opening and transfer documents.
- Create CRM requests for wires, ACH, journal and check requests and track at custodian for completion.
- Prefilling documents and completing DocuSigns.
- Paperwork processing and follow-up.
- Renaming, filing, and processing paperwork daily.
- Escalate issues or complex tasks to appropriate personnel.
- Assist with onboarding new advisors and clients.
- Maintain all client and advisor files in orderly manner.
- Answer telephone calls.
- Follow operational procedures.