



Client Service Administrator & Executive Assistant

Purpose:

We are seeking a highly organized and resourceful **Full Time Client Service Administrator (CSA) & Executive Assistant** to join our dynamic wealth management team. This individual will play a pivotal role in delivering first-class client experience, supporting the team with executive and operational tasks, and ensuring seamless office operations. The ideal candidate is ambitious, detail-oriented, and thrives in a client-centric and fast-paced environment.

At our firm, we deeply value loyalty, teamwork, and mutual support. You will be joining a team that genuinely cares about your success and well-being, offering educational opportunities and hands-on experience to help you grow both professionally and personally. We are committed to fostering a supportive and nurturing environment where you feel valued and empowered. If you are looking for a role where you can contribute meaningfully, grow alongside a dedicated team who prioritize your development, we encourage you to apply.

Key Responsibilities:

Client Service Administration (50%)

- Serve as the first point of contact for clients, fostering positive relationships and addressing inquiries.
- Manage client account documentation, including opening, maintaining, and transferring accounts.
- Process client requests such as account changes, beneficiary updates, distributions, and gifting transactions.
- Coordinate the asset transfer process with custodians, ensuring accuracy and timeliness.
- Prepare materials for client meetings and investment reports, ensuring accuracy and professionalism.
- Maintain CRM records and ensure data integrity for client interactions.
- Supervise client account activity, researching & resolving issues promptly and efficiently, utilizing internal and external resources.
- Manage incoming paperwork, checks, and client mailings with attention to detail.
- Maintain risk awareness and compliance, identify problems in a timely manner while aligning with standard resolution policies.

Executive Assistant & Office Operations (50%)

- Work closely with the partners to oversee day-to-day operations of the firm.
- Handle executive administrative tasks, including calendar management, meeting coordination, and correspondence.
- Organize and manage travel arrangements, including booking flights, accommodations, and itineraries.



- Prepare presentations, reports, and agendas for meetings and events.
- Support office operations by managing supplies, maintaining vendor relationships, expenses, and troubleshooting service issues.
- Assist in marketing, event planning, and social media efforts to support brand initiatives.
- Maintain office organization and ensure a professional and welcoming environment for clients.
- Handle sensitive information with discretion and professionalism.

Qualifications & Skills:

- **Education:** High school diploma required; bachelor's degree preferred.
- **Licensing:** Series 7 license preferred, or ability to obtain.
- **Experience:** Administrative or executive assistant experience required; investment industry experience a plus.
- **Technical Proficiency:** Strong skills in MS Office (Word, Excel, PowerPoint, Outlook) and CRM software.
- **Key Traits:**
 - Exceptional attention to detail and organizational skills.
 - Strong verbal and written communication abilities.
 - Proactive problem solver with excellent follow-through.
 - Ability to manage multiple priorities in a dynamic environment.
 - Team-oriented with a client-first mindset.
 - Ability to handle confidential information with integrity.

Compensation & Benefits:

- **Base Salary:** \$50,000-\$95,000 annually.
 - *Actual base salary varies based on factors including but not limited to relevant skill, prior experience, education, and demonstrated performance.*
- **Bonus:** Annual performance-based bonus potential.
- **Retirement Benefits:**
 - 5% 401(k) match (100% match up to \$8,500).
- **Paid Time Off:** 10 business days annually during the first two years of employment, with increases thereafter.
- **Medical & Dental Insurance**

Location:

This position is based in **San Juan Capistrano, CA**, and requires in-office presence. Occasional extended hours may be required during peak periods. We are a family-oriented firm that prioritizes work-life balance and provides flexibility to support your schedule.

Why Join Us?

Join our dedicated team and contribute to a growing wealth management practice. We foster a collaborative culture that values hard work, professional development, and client satisfaction.