Audible Wealth
YOUR FINANCIAL PLAYBOOK

Client Associate

Audible Wealth Management is a leading financial advisory firm based in Silver Spring, Maryland, just outside of Washington D.C., with ambition to become a preferred career destination for talented professionals.

Our primary objective is to build prosperous lives as we assist clients in reaching their goals. We believe constructing a dynamic team will expand our ability to provide the best possible service to our clients.

We are hiring an Client Associate to join our talented team to help us continue to deliver great value to new and existing clients.

Firm Search

We are seeking a client-focused professional to help deliver exceptional client services. The Client Associate role aims to enhance the client experience by servicing clients and providing operational and administrative support to Financial Advisors. The ideal candidate will fully understand and execute the firm's policies, procedures, and protocol to facilitate a smooth and adequate client experience.

Client Associate Responsibilities

- Process account service requests and ensure appropriate paperwork.
- Account management and maintenance for clients.
- Educate clients on account services and capabilities, online services, portals, etc.
- Input data into Financial Planning tools.
- Review daily branch reports, alerts, and process
- Assist in the preparation of client reports and other materials for client meetings tasks.
- • Assist with on-boarding new members to the team.
- Maintain contact management systems with up-to-date key client information.
- Direct incoming phone calls to appropriate team member.
- Support the Advisors and clients in the account opening process
- Facilitate the transfer of funds on behalf of clients.
- Participate in team meetings, team projects, and other tasks to advance the growth of the business

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Qualifications

Required Qualifications

- College degree or equivalent required.
- 1 – 3 years of client service experience.
- Proficiency with Microsoft Office Products – Power Point, Excel, Word, Outlook.
- Strong written and verbal communication skills to interface with clients and prospects.
- Ability to work in a team setting and independently to ensure client success.
- Develop and maintain strong client relationships.
- Strong organizational skills to manage multiple client accounts simultaneously.
- Promptly reply to requests.

Preferred Qualifications

- 5+ years of client service experience.
- Series 6, 7, 63, 65, or 66 preferred.
- General understand of financial planning concepts and strategies.
- Proficient understanding of CRM software platforms.
- Ability to learn new processes quickly, take initiative and multi-task with little supervision.
- Direct calling and email communication with clients.
- High level efficiency with data entry.

Benefits

- Competitive based salary for top candidate
- Performance Bonus
- Hybrid Work Environment
- Flexible and Great Company Culture
- Enhanced Holidays / PTO
- Sick Days / Personal Leave
- Retirement Savings Plan
- Healthcare, Vision, and Dental plans
- Group Life Insurance
- Annual Corporate Retreat
- Career Development Support

How to Apply →

Interested applicants should send their resumes with a cover letter to **info@audiblewealth.com.** We will contact you if we believe your qualifications meet our needs. Thank you!

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