CALIBER WEALTH
MANAGEMENT

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Client Service Specialist

Job Description and Responsibilities

Caliber Wealth Management highly values its employees and is proud of the tight-knit culture it has created for clients and employees alike. As a company, we focus on providing professional financial advice with the aim of enhancing our client's quality of life. We believe that the best way to accomplish this is through helping them achieve their financial goals.

We are looking for a resourceful individual who is passionate about delivering exceptional client service. We are excited to add to our team and find new ways to elevate our firm. We want someone who can add value and bring new ideas and improvements to the position.

The Client Service Specialist is key to maintaining positive relationships with our clients and to ensuring that client accounts are effectively supported. Having an individual in this position who can identify and meet client needs is crucial to the long-term success of our business.

The Client Service Specialist is responsible for the day-to-day maintenance of client accounts and ensures that our clients receive a high level of personal attention. Responsibilities include opening new client accounts, assisting with new client onboarding, scheduling/preparing for client reviews, and updating client information. The Client Service Specialist will also participate in data entry, processing money movement requests, and client form preparation.

This is a great position for someone who is looking for additional experience in the financial planning industry, particularly in the wealth management sector.

Qualifications and Skills

Required Qualifications

- High School graduate
- Microsoft office programs proficiency
- 1 year of experience in an administrative or client-support role

Required Skills

- Excellent verbal and written communication skills
- Strong attentional to detail
- High quality follow-through
- Ability to manage time and prioritize projects

Preferred Qualifications

- Series 06 - FINRA, Series 07 - FINRA, Series 63 – FINRA, or Series 65 - FINRA
- Bachelor's degree in finance, business administration, or related field
- Previous experience in the financial planning industry

To apply email your resume to madison@caliberwm.com