



## Client Service Manager

Are you a detail-oriented, service-driven professional who takes pride in getting things done the right way? We're seeking a Client Service Manager to join our dynamic team. You'll play a critical role in executing all aspects of client account activity, ensuring accuracy, efficiency, and a seamless experience for our clients. You will be an integral contributor, working closely with Wealth Managers and Associate Wealth Managers to deliver consistent, high-quality wealth management services.

### What You'll Do:

**Transaction Execution:** Own the execution of all client transactions, including money movement (wires, ACH, checks), distributions, contributions, journals, and asset transfers, ensuring accuracy, timeliness, and proper documentation.

**Account Management:** Prepare and process account onboarding and maintenance, including new account setup, transfers, and updates. Coordinate with custodians to ensure all accounts are established and maintained correctly.

**Operational Excellence:** Serve as the primary point of ownership for operational follow-through, monitoring custodial alerts, resolving exceptions, and ensuring all client requests are completed from start to finish.

**Data & Systems Management:** Maintain accurate and up-to-date client records across CRM, custodial, and reporting systems. Ensure consistency across platforms and uphold strong documentation standards.

**Workflow & Process Management:** Execute and manage repeatable service workflows. Track tasks to completion, maintain procedural documentation, and identify opportunities to improve efficiency and reduce risk.

**Professional Growth & Industry Engagement:** Stay ahead of wealth management trends, build your professional network, and represent our firm at industry events.

**Team Collaboration:** Partner closely with Associate Wealth Managers to support the client experience through efficient execution. Provide timely updates, ensure clear handoffs, and escalate issues when needed.

**Embrace Flexibility:** Adapt to changing priorities and responsibilities with ease, demonstrating flexibility and a willingness to support the team wherever needed.

**Take Ownership:** Take ownership of day-to-day operational responsibilities and ad hoc projects, demonstrating initiative, accountability, and a commitment to getting the details right.

### What You'll Bring:

**Alignment with Our Values:** A commitment to upholding our core values of independence, excellence, integrity, and community in all aspects of your work.

**A Positive Attitude:** You bring care, consistency, and a strong sense of responsibility to everything you do.

**Experience:** 2+ years of client service or operations experience in a wealth management or financial services environment preferred.

**Organization Skills:** Exceptional attention to detail and strong organizational skills, with the ability to manage multiple tasks and priorities effectively.

**Communication:** Clear and professional communication skills, both written and verbal, with the ability to coordinate effectively across teams.

**Team Spirit:** A collaborative mindset with a willingness to support others and contribute to shared goals.

**Client Focus:** A client-first mindset with a genuine desire to provide exceptional service and enhance the client experience.

**Flexibility:** An adaptable nature with the ability to thrive in a fast-paced, dynamic environment and embrace change with enthusiasm.

**Ownership Mentality:** A proactive approach with a strong sense of accountability for your work and its impact on the broader team.

## Why You'll Love Working With Us:

**Culture of Excellence:** Join a team that's committed to excellence in everything we do, from client service to professional development.

**Collaborative Environment:** Work in a supportive and collaborative environment where your contributions are valued, recognized, and rewarded.

**Opportunities for Growth:** Take advantage of opportunities for professional growth and advancement as you develop your skills and expertise.

**Meaningful Impact:** Be part of something bigger than yourself, making a meaningful difference in the lives of our clients and helping them achieve their financial goals.

## What We Offer:

**Salary:** \$75,000 - \$110,000, dependent on experience and education

**Benefits:** Include healthcare plan, 401(k), long-term disability, bus pass, and gym membership

**Annual Bonus:** Merit-based bonus for achieving specific goals

**Professional Development:** Support of your pursuit of relevant career development opportunities

## Who We are:

Founded in 2007, Fulcrum Capital is an independent Registered Investment Advisor based in Seattle. Our clients are individuals, families, foundations, and companies who seek a trusted partner to help them navigate their financial lives. We provide a thoughtful approach to investing, helping our clients understand what they own and ensuring their portfolios align with long-term goals and personal values. Our clients and team members value our independence, transparency and thought leadership, particularly in the realm of sustainable investing. We value diversity and support work-life balance. Our firm is majority women-owned and all of Fulcrum's owners work at the firm; we are 100% independent.

For more information contact:

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