FULCRUM
CAPITAL

Client Service Associate

This is a great opportunity for an experienced client service professional to join one of Seattle's fastest-growing independent wealth and investment advisor firms. We are seeking a professional with a passion for client service and a keen attention to detail.

The client service associate is a key contributor to client relationships and will work closely with the advisor, investment, and operations teams to deliver an exceptional service for all the firm’s clients. This position reports to the Chief Operating Officer.

Responsibilities

- Prepare and process all documentation related to client onboarding and ongoing client servicing; including account applications, transfer documents, and other forms as required
- As a liaison with our custodian, respond to daily custodial alerts or other notifications; troubleshoot, escalate as appropriate, and determine the proper action required; maintain the accuracy and integrity of electronic recordkeeping
- Handle transaction requests, including money movement, distributions, journals, and asset transfers
- Manage client data in file folders and CRM; set up clients for access to financial planning and client reporting portal; keep records current and organized
- Assist in the development of client service business processes
- Prepare and update procedural documentation for the client service team
- Provide support for marketing efforts as directed
- Support advisor team in serving clients; including assistance with meeting preparation and distribution of periodic newsletters, cards, and gifts
- Assist with ad hoc administrative projects; respond to task requests from team members in a timely and accurate manner; follow up to ensure completion

Qualifications

- Undergraduate degree desired; Finance or Accounting preferred
- At least two years of operations or client service experience with high-net-worth clients in a wealth management setting
- Excellent written and verbal communication skills
- Highly proactive with a strong work ethic
- Passionate about client service and diligent about confidentiality
- Exceptionally organized and detail-oriented
- Self-motivated and driven towards continuous improvement
- Sound judgment and recognition of the need for urgency, as required
- Strong knowledge of Microsoft Office, including Word, Excel, PowerPoint, and Outlook
- Familiarity with Tamarac, Schwab Institutional. and CRM tools; Salesforce preferred

Compensation and benefits

- Pay and benefits competitive with industry standards
- Base salary determined by experience and education
- Full benefits include healthcare, bus pass, gym membership, and profit-sharing
- Support for relevant career development opportunities

Company Description

Fulcrum Capital attracts and retains the most talented, credentialed, and community-minded professionals in wealth management. Every member of our seasoned team is passionate about helping clients achieve their financial goals.

Founded in 2007, Fulcrum Capital, LLC is an independent Registered Investment Advisor headquartered in Seattle. Our clients are individuals, families, and nonprofits with vision, character, and integrity. Clients choose Fulcrum because they want to know what they own and be confident that their holdings align with their 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 100% employee-owned and majority-women-owned.

Qualified candidates please contact:

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