

**Job Title:** Client Success Specialist

**Summary / Objective Statement:**

The Client Success Specialist will enable positive client experiences by providing direct support to advisors and to clients. With a focus on regular duties and ad-hoc tasks, a successful Client Success Specialist will facilitate Client-Advisor engagements by completing required forms, promote data management integrity, support meeting preparation and follow-up, among other assigned duties.

The Client Success Specialist is an on-site role with opportunities for growth and career advancement.

Part-time role with opportunity for full-time advancement (25 hours/week)

**Essential Functions:**

- Manage day-to-day operational activities to facilitate Client-Advisor engagement, including forms/document preparation and review.
- Track in-progress operational tasks and create efficiencies through task management system.
- Update key client data with meeting notes and other documentation/data for consistency across systems.
- Support regular monthly and quarterly reporting and billing tasks.
- Other duties as assigned.

**Targeted Education & Experience:**

- Bachelor's degree preferred, or relevant work experience considered.
- 3-5 years' experience working in Financial Services operations desired, but not required.
- Industry licenses are a plus and support advancement opportunities.

**Preferred Skills & Competencies:**

- Proficient with Microsoft Office suite, especially Excel and PowerPoint.
- Familiarity with CRM platforms and Reporting systems.
- Ability to communicate effectively with clients and internal stakeholders across mediums.
- Keen attention to detail
- Ability to manage multiple projects/tasks and prioritize actions based on business needs.

**Benefits:**

- Competitive pay
- Paid Holidays & 10 days PTO
- 401(k) available