COPPER LEAF FINANCIAL

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Client Services Associate

Copper Leaf Financial, LLC is looking to add an upbeat team member that is people and detail driven, to join our innovative wealth management firm. This position will provide full support to our Clients and Wealth Advisors, ensuring client satisfaction through direct-contact with clients, and other team members.

Responsibilities include:

- **Account Administration:** Provide onboarding and service support, both for current clients and prospects. Prepare and process account opening and change paperwork, account submission and follow-up, and client account updates.
- **Administrative Support:** Provide general administrative support such as managing logistics for meetings, managing calls and emails, scheduling appointments, etc.
- **Client Organization:** Create and maintain client files in CRM and other systems.
- **Communication**: Assist with calls to prospects and clients, schedule all client-related appointments, and work with Marketing Coordinator on mailings and events
- **Client Service:** Frontline connection between clients and advisory staff, build relationship with clients, introduce technology and services to clients as appropriate. Client and prospect greeting, meeting prep and follow up.

BACKGROUND

- This position will require an individual to pass the Series 65 Exam within 6 -12 months of starting in this position. Resources and accommodations to aid in passing of this exam will be provided.
- Optimistic, can-do attitude
- Strong attention to detail
- Must have strong organizational and prioritization skills
- Problem solving skills to determine the most efficient method of problem resolution while complying with regulatory procedures.
- Must be client services oriented
- Must be computer literate and proficient with MS Office.
- Experience in a fast-paced, professional environment
- Experience within the financial services industry is preferred

Interested candidates are to send a cover letter and resume to kathryn@copperleaffinancial.com. We appreciate all interest in this position, only candidates closely aligned with this search will be contacted.

Copper Leaf Financial, LLC does not discriminate in employment based on race, color, religion, sex (including pregnancy and gender identity), national origin, political affiliation, sexual orientation, marital status, disability, genetic information, age, parental status, military service, or other non-merit factor

Copper Leaf Financial is a fee-only, fiduciary firm and a registered investment advisor with offices in Burlington and Rutland Vermont. We develop customized wealth management plans designed to integrate every aspect of our client's financial life. We call our approach "true wealth management" - a holistic, all-encompassing approach that goes beyond just investment advice.