

V&A | VAHANIAN
& ASSOCIATES
FINANCIAL PLANNING INC.

60 Railroad Place, Suite 104, Saratoga Springs, NY 12866

Client Services Specialist

We are looking for a professional with strong interpersonal and collaboration skills who has the ability to thrive in an environment where quick-thinking, proactive initiative, determination and team-player mentality are fundamental to supporting our clients and firm.

This role is primarily administrative and operational, but does include interaction with clients as well. This position will present an opportunity to learn multiple aspects of our business from the ground up and ultimately determine if there is a specific area of focus/interest for pursuit.

Responsibilities (Included but not limited to):

- **Client Services:** (Asset transfers, e-delivery and website portal support, meeting scheduling/preparation, including use of portfolio management software and reporting, creating meeting agendas, aggregating necessary supportive documents, account paperwork, updating client records, trade notes/checking/confirmation, and indexing client documents/information into CRM.)
- **Organizational Support and Project Management:** (Collaborate with team members across firm-wide projects, with an opportunity to spearhead specific projects as needed.)
- **Ongoing Team Support:** (As a small office, everyone is expected to wear many hats and be cross-trained in multiple functions. There may be times when this role is needed to provide support in a limited compliance or investment execution capacity, as well as office administration.)

Qualifications:

- Prior financial services or banking experience required
- Strong background in Microsoft Office suite (Outlook, Word, Excel, Nuance, etc.)
- Experience using CRM and client record-keeping software
- Strong client focus and relationship management skills
- Strong communication skills
- Commitment to integrity and a high level of excellence
- Self-motivation

- Ability to work autonomously and collaborate with team members
- Ability to problem solve and develop solutions for clients and office
- Strong multitasking skills
- Strong attention to detail
- Background in technology
- Experience with e-signature a plus
- A bachelor's degree is required
- SIE, Series 7 and 63 preferred but not required immediately.

What you will receive:

- Competitive compensation commensurate with experience and bonus potential.
- Annual wellness program after six-months of employment.
- 401(k) participation and employer match after one-year of service.
- Employee health insurance benefits paid in full (medical, vision and dental).

How you will fulfill your potential:

We hire based on character and integrity first. However, certain skills, abilities and experience are still required as indicated. At Vahanian & Associates, we believe success and an ability to fulfill your potential is based on a balance of hard work, commitment to excellence, leveraging your unique skillset, and collaborating with team members. Above all, we want you to exceed your own expectations. We believe that a career with our team has the potential to enhance your life, expand your skills and abilities while also supporting our clients.

