HUNTER ASSOCIATES
INDEPENDENT WEALTH MANAGEMENT

Client Service Associate

Description:
Professional, highly competent administrative support position to work directly with an experienced team of Financial Advisors and Associates to bring client service tasks and projects to completion. This individual must possess the ability to work closely with both the advisors and support individuals within the team and the greater firm as a whole. Strong communication skills, excellent work ethic, exceptional attention to detail and superior customer service skills are a necessity and considered imperative to measure job performance. Ability to process a high level of workflow independently is required.

General Duties:
This role is responsible for the completion of client service-related tasks as well as supporting other members of the team. Individual must complete various tasks as assigned with a high level of diligence to see project from start to finish. Basic tasks will include but not be limited to:

- Add and maintain client data across business systems, using document management and customer relationship software
- Process new client account forms, client service requests and general account maintenance as directed
- Client communication including answering phone calls and greeting clients
- Assist with quarterly portfolio reports and client review meeting presentations
- General clerical functions for the firm (typing, filing, phones, etc.)
- All project work as assigned

Qualifications:
Required:

Undergraduate degree or equivalent experience
Detail-oriented with superior organizational skills
Strong computer skills with knowledge of Microsoft Office products
Personable and client service oriented
Able to maintain highest level of confidentiality
Able to work under pressure and balance multiple projects simultaneously
Must pass the Securities Industry Essentials (SIE) Exam within 6 months of hire

We offer:
Hunter Associates provides competitive compensation and an engaging environment centered on freedom with responsibility. Our culture arises from being a team of high-achieving individuals dedicated to helping our clients define and reach their financial objectives. Hunter Associates is an employee-owned, independent wealth management firm. We offer a comprehensive benefit package including a 401(k) and medical, dental, vision, life and disability insurance.

About the Firm:
Hunter Associates' primary goal is to help our clients define and achieve their financial objectives. Our further goal is to provide our associates with growth opportunities, a rewarding experience and a pleasant environment. Our success, both financial and otherwise, will be a by-product of achieving these goals. Member of FINRA and SIPC. www.hunterassociates.com

To Apply: Please submit a resume and cover letter by email to Jessica Rhenish at rhenish@hunterassociates.com.