Client Service Associate

Brown | Miller Wealth Management
8280 Greensboro Dr., Suite 220 | McLean, VA 22102

POSITION OVERVIEW

Brown | Miller Wealth Management, based in the Washington DC area, is seeking a dedicated Client Service Associate to join their growing team. The Client Service Associate position is an empowering, customer service orientated role with endless opportunities. The client service team is very important, as they are the first voice a client hears when they call the office.

This position will be focused on providing exceptional client service to current and potential clients; accurately administer updates for complex and multi-step client accounts to include account updates, asset movements, account transfers, and fostering new household relationships. The ideal candidate is one that is thorough in their work, operates with a high attention to detail, has a warm and caring attitude, is willing to learn, and encompasses great time management and problem-solving skills.

If you thrive in a collaborative and supportive culture, deliver outstanding client experience, and are looking to advance your career with an engaged team, we look forward to hearing from you!

Highlights of the responsibilities of the Client Service Associate include, but are not limited to:

- Consistently delivers superior and proactive client service. Actively responds to incoming emails, phone calls, and requests from clients. Creates and follows own action plans/tasks based on client needs and requests
- Focuses on complex and multi-step client account updates and asset movements, including new household relationships, trust management, account transfers, and deceased processing
- Prepares, sends, and processes account documents
- Enters securities trades and processes order corrections
- Assists with active communication with clients and reaches out to correct any items needed. Keeps client aware of any longer-term project status
- Assists with updates, maintenance, and tracking of proprietary asset allocation models and strategies
- Special projects as needed

Required Qualifications:

- College level coursework is required (Bachelors' degree preferred) in conjunction with a financial industry professional license/ designation: Series 7 & 66, 65, Investment Advisor Representative or CFP
- A minimum of two (2) years of investment/financial industry experience working in client services and a knowledge of financial industry compliance

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Our Ideal Candidate brings the following:

- Self- motivated with a drive towards service and operation excellence; displays a positive attitude through all client and internal interactions
- Possesses a genuine interest in serving and caring for clients and enjoys working with other professionals in a supportive team environment
- Takes ownership and responsibility around Brown | Miller's client service mission and contributes wherever needed
- Excellent oral, written, and interpersonal communication skills; well-spoken both on the phone and in person
- Professional demeanor, a pleasant personality, open minded, and patient
- Advanced computer skills including MS Office Suite required

Benefit offerings:

- Competitive base salary with performance bonus potential
- 401k: 4% match with additional discretionary profit sharing
- Comprehensive medical and dental insurance
- Long-term disability insurance
- Paid Time Off and Paid Holidays following the NYSE observed holidays schedule

More About Brown | Miller Wealth Management

The Brown | Miller Wealth Management team has been providing financial advisory services to clients for over 25 years. We specialize in working with high net-worth individuals, businesses, endowments, and foundations to help them simplify their complex financial needs. Our highly regarded wealth management team built their clientele during their time working for A.G. Edwards and Sons, Wachovia Securities, and Wells Fargo Advisors before launching their independently owned practice, Brown | Miller Wealth Management, LLC.

At Brown | Miller Wealth Management, our mission is to be an industry-leading wealth management firm providing clients with exceptional advice and service. Our team works collaboratively to deliver excellence in every aspect of the client experience. We strive to be recognized as a client-centric practice providing objective and independent advice, service, and solutions always in the best interest of our clients.