NorthAvenue
FINANCIAL ADVOCATES

HIRING FOR OUR NEW: Client Service Associate

Who We Are

Being clear and kind. Empowering our clients and each other. Doing the right thing. Being generous. Seeking knowledge and understanding. These are the core values of **NorthAvenue Financial Advocates**. We are a forward-thinking, client-focused, socially conscious, women-owned financial planning firm providing all-inclusive wealth management services for one transparent fee. Based in Clintonville (Columbus), OH we serve about 100 families nationwide.

Led by our founder, Kristen Moosmiller, who was named to the Investment News' 40 under 40 in 2016 and recently served on the NAPFA national board of directors (working with DE&I and Women's Initiative), we are a passionate and compassionate team with two decades of combined fee-only financial planning experience. We are an organization that believes in giving back to our community and have donated annually to causes such as the Women's Fund of Central Ohio and the Ohio Environmental Council.

Our team is collaborative and celebrates diverse perspectives, individuals, and ideas. Our one-stop-shop model provides holistic financial planning, investment management, tax planning, and tax preparation. We see this as the perfect way to meet the varied needs of our clients and sets us apart within the industry. We strive to serve our clients in helping them achieve their financial objectives by providing stellar client service.

We are a part of the less than 5% of women-owned businesses generating over $1M in revenue and our goal is to continue growing. We can't do it alone and are excited to welcome a Client Service Associate to our team!

Who You Are

You share our core values and are excited to work with a women-led team looking to change the financial planning industry by challenging long-standing biases about the typical financial advisor. You aspire to focus your time on providing comprehensive financial planning, supported by a team of investment professionals, so you can focus on your top priority: putting the client's best interest first. You are thrilled by the opportunity to work in an environment where you are **not** expected to actively generate new prospects and the company stability is not subject to market fluctuations.

You are seeking an environment where you can work directly with a successful management team that will provide you with one-on-one mentoring.

You are an affable person who will enjoy helping an appreciative client base and can prioritize tasks and communicate issues effectively to team members. You like to handle various tasks day-to-day and feel a sense of pride in a job well done.

Job Overview

The **Client Service Associate (CSA)** provides essential operational support to the NorthAvenue advising team. They regularly interact with clients to help train them on the NorthAvenue Client Portal, maintain their Net Worth data, and assist them with outside providers such as employer 401k and insurance agents. They also assist advisors with preparation of financial planning materials, gaining experience required to advance to an Associate Advisor.

The needs of our clients are varied. Accordingly, opportunities to learn about a broad range of planning topics will be plentiful.

An ideal Client Service Associate candidate thrives in an entrepreneurial and fast-paced office, finds pride in taking charge of their responsibilities, looks for innovative ways to efficiently manage client service, and seeks clarity and understanding through proactive communication. Working with clients, custodians, and other team members, the CSA is calm under pressure, maintains a willing and intuitive attitude with all staff members, and is receptive to feedback. The CSA is ready to help out where needed.

Essential Functions

- Onboard and train new and existing clients on various NorthAvenue client portals (eMoney, ByAllAccounts, and Tamarac). Including assistance in person and through video conferencing / screen-sharing software to help clients aggregate accounts outside of our custodians.
- Participate in the ongoing maintenance of client portal data that is not directly feeding on our custodians, keeping client net worth and investment data accurate as they provide us with updates.
- Assist clients with paperwork and transaction processing relating to outside accounts, such an employer 401ks.
- Manage client appointment calendar and schedule client meetings for all Senior & Lead Advisors.
- Request specific documents from clients that are necessary to prepare an adequate financial planning analysis of a client’s situation in advance of their scheduled meeting.
- Coordinate with outside professionals, as necessary, to implement the client's plan.
- In conjunction with the Analyst, thoroughly prepare client estate and insurance trackers in advance of each scheduled client meeting. Keep these materials up-to-date outside client meetings as information changes.
- Serve as a true team player who is willing to help out with ad hoc items in the office.
- Cross-train with other team members.

Requirements

- One of the following:
  - BS/BA degree from an accredited college or university
  - 1+ years of relevant financial professional experience
  - 2+ years of administrative professional services office support
- Microsoft Office skills.
- TD Ameritrade, Schwab, Redtail CRM, eMoney, Tamarac, and ByAllAccounts experience is a plus!
- Part-time presence in the Clintonville (Columbus), OH office to meet with clients and prospects.
- Able to work full-time.
- 100% commitment to company values.

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Benefits

- Hybrid office/virtual working model.
  - We work in the Clintonville office on Tuesdays and Thursdays.
  - Flexibility to work from home Monday, Wednesday, and Friday.
- Private office with exterior window.
- Competitive salary of $45k-$60k, plus bonus structure.
- 401(k) plan with 6% employer contribution.
- Employer funded Health Reimbursement Arrangement of at least $3,600 annually.
- As applicable, company-paid notary, Series 65, CFP® review materials, test expenses, annual designation fees, and continuing education.
- All expenses paid annual company retreat.
  - We rotate to team member's desired locations around the U.S. each year.
- Personal tax preparation annually.
- Financial Tune-Up by internal advisor annually.
- Three weeks of paid vacation in addition to common holidays.
- Tight-knit team where your personal input will be valued.

How to Apply!

Please apply through our **NorthAvenue LinkedIn page** or by emailing your resume to **Apply@NorthAvenueFA.com**.