Client Service Associate

At OLV Investment Group you will discover the driving force of our company is honesty and ethics. What we think is best for our clients and our staff will always be paramount to personal or corporate profit. As a company, we work as a team – not as individuals- drawing from the energy and skills of each other. Rooted in history and faith, OLV has been blessed with many gifted individuals who share a common mission of INVEST INCREASE IMPACT in the marketplace as we engage with our clients, community, and one another.

The Client Service Associate at OLV Investment Group is an integral part of our team serving as the link between our advisory team and clients. This great organizer, reliable and consistent person will support the vision, positive culture and service across our firm and clients.

The key role of this position is to engage and support the overall success of many different projects and initiatives and by working side-by-side with our Advisory team. The Client Service Associate focuses on advisor support and client success through accurate completion of meeting and account operations. This individual enjoys and excels at managing the day-to-day advisor/client service, paperwork, compliance, and technology.

Client Service Associate Qualifications

Experience and Education:

- Bachelor's degree preferred
- Administrative training or one to three years equivalent work experience preferred
- Must be a US citizen or Permanent Resident
- Pursuing SIE or similar certification

Skills and Knowledge:

- Strong interpersonal skills
- Exceptional work ethic-self-motivated and goal-oriented
- Proficient in written and verbal communication
- Dedication to detail and accuracy
- Excellent administrative, time management, and organizational skills
- Cooperative in a team environment and committed to doing their job
- General tech stack proficiency
- Demonstrates personal integrity, honesty, and can deal with confidential information daily
- Ability to prioritize multiple tasks and anticipate potential problems

Disclosure – Above list of responsibilities of job description is not all inclusive. Job responsibilities and duties can and will change over time. Open and real time communication will be necessary between employee and supervisor.

<u>Client Service Associate Job Description</u>

Client and Firm Engagement: Lead in Alignment with OLV Core Values of Grace, Growth, Grit, and Generosity

- Provides administrative support as needed: answers calls, manages contacts, manages schedules
- Establish and maintain all client accounts and assist in client service needs/requirements/requests through fee-based platform, brokerage or directly held companies
- Create and maintain all virtual file, CRM, and EMoney needs for individual clients and/or for OLV Investment Group
    - All miscellaneous client updates and cleanup
    - All client address changes
- Support marketing and client events as requested
- Send paperwork to clients using the electronic signature system while adhering to the Custodian's compliance rules pertaining to electronic signatures
- Quality check and submit custodial items for processing
- Work with multiple software and financial and technical programs used to function daily.

Advisory Support:

- Engage and support weekly client meetings:
    - Paperwork Processing:
        - Prepare reports for client reviews and presentations
        - Set up agendas and other Review items
        - Work with FMOs and insurance companies to process insurances when needed
        - Communicate with clients via phone/email/hard copy mail when needed to complete paperwork processes and service requests
    - Print Paperwork for weekly in office meetings
- Client Onboarding:
    - Basic Account Openings
    - Account Transfers
    - Client Data Sheet
- Establish positive working relations with OLV's Broker Dealer (BD)
- Manage and maintain all state licensing requirements for financial advisors

Compliance:

- Support Compliance to maintain an effective and ethical firm
- Conducts all paperwork compliance requirements
- Perform related tasks as assigned
- Establishing and maintaining relationships with the management team and informing them of any circumstances that require supervisory attention, review, or approval per compliance guidelines.

Location: Flint, MI
Travel: Up to 10% of the time between offices and events
Full / Part-time: Full Time
Hours Per Week: 40 hours Minimum
Shift: 1st Shift
Salary: $40-$50k annually

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