

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 U.S. 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 and 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.

Client Service Associate Job Description

Lead in alignment with OLV Core Values of Grace, Growth, Grit, and Generosity

Client and Firm Engagement:

- 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
- 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 on a daily basis.

Advisory Support:

- Engage and support weekly client meetings:
 - Paperwork Processing:
 - Prepare reports for client reviews and presentations
 - Set up agenda 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 relationship with the management team and informing them of any circumstances that require supervisory attention, review, or approval per compliance guidelines

Next Step

Email your resume to Libby VanValin at evanvalin@olvinvest.com

Location: Livonia, 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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