Client Service Associate

OLV Investment Group – Who We Are

At OLV where our purpose is deeply rooted in faith and service, we are committed to embodying our core values of grace, growth, grit, and generosity in all that we do. With a vision to be a distinct light in the financial industry, we strive to love, wholeheartedly serve, and make a lasting impact for God's Kingdom. As we continue to grow and innovate, we are seeking passionate individuals who are aligned with our mission of WORK SERVE WORSHIP to join our team and contribute to our collective purpose. If you are dedicated to serving others, driven by a desire for growth, and motivated by a spirit of generosity, we invite you to explore the opportunities available at OLV. Join us in making a meaningful difference in the world.

Client Service Associate Overview

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

Client Service Associate Job Description

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 custodians and insurance companies when needed to verify account accuracy
        - Communicate with clients via phone/email/hard copy mail when needed to complete paperwork processes and service requests
    - Prepare client Paperwork for weekly in office meetings
- Client Onboarding and Maintenance
    - Establish client CRM profiles and virtual file folders
    - Ensure OLV proprietary paperwork is IGO and up to date
- Establish positive working relations with OLV's Broker Dealer (BD)
- Support LSCSA in RMD processing as needed
- Support LSCSA in data clean up projects as needed

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, Livonia, MI, or Frisco, TX
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

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.