PRENTICE
WEALTH MANAGEMENT

Position Title:	Client Service Associate
Company:	Prentice Wealth Management, LLC, 110 Linden Oaks, Suite F, Rochester, NY 14625
Job Type:	Full Time Employee
Experience:	3-5+ Years in Client Service Preferred
Education Level:	Associates Degree or Higher Preferred
Salary:	$35,000 - $45,000

Who We Are: Prentice Wealth Management, LLC is a leading Wealth Management firm headquartered in Rochester, NY. Established in 2008, it is a growing RIA with extensive expertise in financial planning and wealth management for individuals and business owners.

Position Summary: The Client Service Associate will report directly to the Director of Operations, having a primary duty of enhancing existing PWM client relationships. The PWM Client Service Associate will perform a wide variety of administrative support duties and must be dedicated to continuous professional improvement and to completion of tasks from start to finish.

Position Responsibilities:

- Maintain compliance approved client files & CRM system.
- Prepare financial reports for client reviews.
- Build and maintain client relationships for both new and existing business.
- Maintain calendars and schedule appointments.
- Field and screen all incoming calls.
- Participate in weekly team meetings.
- Welcome all visitors to the office with professionalism and expedite their needs.
- Serve as a resource to wealth planners.
- Actively engage in available training/education programs.
- Act as a liaison between affiliates and the service team.

Candidate Requirements:

- Associates degree (all majors welcome.)
- Familiarity with financial terminology is preferred but not required.
- 3-5 years of related work experience preferred.
- Professional attire and demeanor.
- Proficiency with Microsoft Office (Word, Outlook & Excel.)
- Ambition, attention to detail, high energy and strong desire to succeed.
- Excellent communication skills
- Ability to work independently and as part of a team.
- Unwavering personal integrity.
- All candidates must be eligible to work in the United States without sponsorship.
- Must have a clean background and undergo a background check.

Benefits Offered:

- Paid time off
- Health Insurance
- 401(k) & Profit Sharing
- Disability Insurance

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