Position Title:	Client Service Associate
Company:	Prentice Wealth Management, LLC, 110 Linden Oaks, Suite F, Rochester, NY 14625
Job Type:	Full Time Employee
Experience:	5+ Years in Financial Client Service/Financial Administrative, Preferred
Education Level:	Associates Degree
Salary:	$45,000 Annually, Additional 10% Discretionary Bonus Based Upon Performance
Hours:	Monday-Friday 8:30am-5:00pm

About Our Firm: 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. Committed to providing the highest value wealth management experience to those appreciating a fiduciary partner focused on superior service, PWM advisors maintain a selective and limited number of client relationships meeting their targeted needs through customized solutions.

Position Summary: The Client Service Associate will report directly to the Director of Operations, having a primary duty of enhancing existing PWM client relationships. This position offers an opportunity to develop financial planning and customer service skills while working in a collaborative environment with experienced wealth management professionals. The PWM Client Service Associate must be dedicated to building exceptional client relationships, to continuous professional improvement, and to completion of tasks from start to finish.

Position Responsibilities:

- This individual will be the primary contact for clients; greeting them in the office, answering incoming calls, scheduling appointments (only Zoom meetings at this time) and processing client service requests.

- Administrative duties include but are not limited to; assistance with opening new accounts for clients, preparation of account service documents, maintaining client files, maintaining client CRM system, processing incoming & outgoing mail, executing money transfers, depositing checks, scanning & faxing, maintaining calendars, and preparing client financial reports.

Candidate Qualifications and Attributes:

- Associates degree (all majors welcome); familiarity with financial terminology is preferred but not required.
- 5+ years of related work experience preferred.
- Professional attire and demeanor.
- Proficiency with Microsoft Office (Word, Outlook & Excel) and Adobe Acrobat.
- Ambition, attention to detail, high energy and strong desire to succeed.
- Excellent communication skills and 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.

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