K·H·C
WEALTH MANAGEMENT
Making Life Count!®

JOB DESCRIPTION
Client Service Specialist

JOB SUMMARY

The Client Service Associate is responsible for the set-up, maintenance and monitoring of client accounts at preferred custodians, maintaining client portfolios in our portfolio accounting system, and general support of Wealth Management and Investment Management Team activities.

JOB RESPONSIBILITIES

- Establish and maintain client accounts, portfolios, and related data in Tamarac Advisor View portfolio accounting software.
- Prepare and deliver new account and account transfer paperwork.
- Process client requests for deposits, withdrawals, and transfers.
- Communicate with clients and team members regarding the status of account activity and expectations for completion.
- Establish and execute the billing process for client accounts.
- Communicate with custodians and accounting system support to resolve client issues and follow-up on documentation sent to ensure proper completion.
- Other projects and responsibilities as assigned.

JOB REQUIREMENTS

Education: Bachelor's degree

Experience: Minimum of two years applicable work experience in the financial services industry

Other:

- Team player, collaborative, able to work with and through others
- Excellent verbal and written communication skills
- Strong client service skills
- Detail-oriented, accurate, organized, and ability to manage priorities

- Aptitude for process improvement and desire to use technology to improve efficiency
- Results driven, with the ability to take initiative
- Ability to make effective decisions using impeccable ethical judgment
- Ability to effectively manage internal projects
- Desire to engage in continuous learning to ensure currency of knowledge and skills

ABOUT KHC WEALTH MANAGEMENT

KHC strives to help people lead the life they want. Our clients don't work 60 hours a week for money only and the hope they can one day "retire". They work to utilize their talents, contribute and build financial wealth to accomplish things – such as funding children's college tuition, caring for elderly parents, traveling to places long dreamed of-- living the lifestyle they desire. Whatever THEIR story, KHC strives to help them achieve it. During every phase of life, we are here to help clients plan and take action to accomplish their goals.

Website: www.makinglifecount.com
Visit our blog at kcfinancialplanning.com

OFFERED EMPLOYEE BENEFITS

- Retirement Plan
- Health Insurance
- Life and Disability Insurance
- Paid Time Off

TO APPLY

Contact: Colleen Wysong at 913-345-1881 or cwysong@makinglifecount.com.