



Position: Client Care Associate

We are hiring a **Client Care Associate** who can provide stellar service to Sound Stewardship, LLC clients. The primary focus of this role is implementing the financial plans and investment strategies designed alongside our Wealth Advisors. Ideal candidates are:

1. **Thorough:** high attention to detail
2. **Clear:** strong communication skills
3. **Organized:** thoroughly completing multiple projects with little supervision

The Client Care Associate is a great position for those starting out in financial planning. This role works alongside experienced Wealth Advisors to serve clients well, in addition to providing access to leading industry associations such as the Financial Planning Association® and Kingdom Advisors.

This position qualifies as experience toward the Certified Financial Planner™ certification and is part of our **Wealth Advisor Career Track**.

Categories of Responsibility:

- Request and prepare information for client meetings
- Prepare, upload and manage online portal for clients
- Assist clients with account maintenance and service requests
- Correspond with custodians and clients to ensure proper implementation of recommendations (e.g. contact information, beneficiary changes, disbursements, contributions, etc.)
- Place trades for clients' portfolios across various custodians
- Enter data into wealth management software programs
- Maintain our investment models across software programs
- Analyze various investment choices and propose appropriate portfolio
- File client and business records appropriately
- Other tasks as assigned

Benefit Offerings:

- Annual bonus plan
- Safe Harbor 401k Retirement Plan with match
- Company-paid health, vision and dental insurance
- Flexible Spending Account, Health Savings Account, and Employee Assistance Programs available
- On-site fitness gym and massage sessions at no cost
- Employer-paid basic life insurance
- Group disability insurance available

Requirements:

- Bachelor's degree, preferably in Financial Planning or related field
- FINRA Series 65 license (to be obtained within 90 days of being hired) and successful passing of a background check
- Proficient in Microsoft Office utilization
- Professional demeanor

Personal Characteristics:

- Good with numbers and the written word
- Precise and accurate ("neatness counts")
- Be a team player and willing to take direction from others
- Works well independently and knows when to ask for assistance

If you're interested in this position, please submit your resume with cover letter to ambra@soundstewardship.com.

