Marblestone Wealth, a Private Wealth Advisory Practice of Ameriprise Financial - Are you a detail-oriented individual with a passion for finance and client relations? We are currently hiring for the position of Client Service Specialist within our practice. Our dynamic culture sets us apart. We take time to enjoy the ride and have fun events and team outings on a quarterly basis. We offer an engaging and supportive environment where you will play a pivotal role in ensuring the smooth operation of our financial services.

Responsibilities:

- Trades/Transactions: Execute and manage trades and transactions aligned with client portfolios and investment strategies.
- Money Movements: Oversee and facilitate money movements to ensure accurate and timely financial transactions.
- Client Service Resolution: Collaborate with the home office to address and resolve client service issues promptly and effectively.
- Applications: Handle various applications related to client accounts and financial processes.
- New Business: Support the onboarding process for new business, ensuring a seamless experience for clients.
- Client Outreach: Engage with clients as needed to strengthen relationships and address inquiries.
- CRM Updates: Maintain and update tasks in the Customer Relationship Management (CRM) system with meticulous attention to detail.

Qualifications:

- Series 7, and Series 66 licenses preferred; or willing to obtain within in six months after being hired.
- Previous experience in a similar role within the financial services industry.
- High attention to detail and ability to thrive in a fast-paced environment.
- Strong organizational and multitasking skills.
- Excellent communication and interpersonal skills.
- Knowledge of financial products and investment strategies.

Benefits:

- Annual bonus opportunities.
- Flexible work environment – in-office, hybrid, or remote options.
- Paid Time Off (PTO) and 10 paid holidays.
- Comprehensive medical, dental, and vision insurance.
- Life insurance and disability coverage.
- 401k with a match, profit sharing.
- Summer hours for a better work-life balance.

How to Apply:

If you are ready to contribute your skills to a dynamic team and grow within the financial industry, please submit your resume and cover letter to Jilene.x.guttenfelder@ampf.com.

Join us in delivering exceptional service and building lasting client relationships!

We are an equal opportunity employer.