Client Service Administrator

Job Description:

The Client Service Administrator ("CSA") is primarily responsible for client administration as well as providing a broad range of support to their assigned client advisory team. The individual's time will be spent assisting with the provision of advice and superior customer service to prospective, new and existing clients.

Duties and Responsibilities Include:

- Assist with client's service requests and inquiries regarding their accounts , including money transfers and the processing of checks, wires and ACHs
- Process and complete the opening/closing of client brokerage accounts per clients or advisory team request
- Resolve client issues through independent research and collaboration with the underlying custodian or other advisory team members
- Process and distribute client investment reports on a quarterly basis
- Assist with the scheduling of and preparation for client meetings
- Provide general administrative support by helping to answer incoming phone calls, scan documents, organize files etc.
- Complete special projects and other duties in support of the client and advisory team, as needed

The Client Service Administrator is an essential part of the client's advisory team within WMS Partners and enhances the establishment and maintenance of client relationships. It will be necessary for this individual to consistently multi-task and complete complex administrative responsibilities.

Desired Skills and Experience:

- Ability to take direction from multiple sources with demonstrated follow through
- Excellent written and oral communication skills
- High level of confidentiality is essential
- Commitment to meeting established deadlines and managing time effectively
- Proficiency with the Microsoft Office Suite as well as CRM and Portfolio Reporting software
- Self-motivated, confident, detail-oriented, and analytical

Qualifications:

- Bachelor's or Associate's Degree from an accredited college or university is preferred
- 3 to 5 years of experience in a client service role or within the financial services industry in general is required

Salary and Benefits:

- Pay/benefits are competitive based on industry standards
- Bonus eligible
- Benefits including 401(k)/profit sharing plan, health insurance, paid holidays, vacation and tuition assistance
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities, if applicable; support amount will be determined by management each year

About WMS Partners:

Founded in 1993 and headquartered in Towson, MD, WMS Partners has over 50 employees and currently manages over $4.3 Billion in assets for approximately 400 families.

We are a fee-only financial advisory and investment management firm. We customize our advice to each client, providing them with recommendations and implementation assistance to meet their specific goals and needs. Our client's families consist of professionals, retirees, corporate executives and business owners. The Firm's continued growth is primarily due to referrals from its existing client base.