Senior Client Service Associate – Wealth Management

ABOUT AGH:

As one of the top 225 CPA and advisory firms in the U.S., AGH has been serving closely held and privately-owned entrepreneurial firms and public sector organizations for more than 80 years. AGH is based in the central U.S., but the firm's reach and specialized expertise available to clients spans the globe. AGH’s more than 130 professionals serve as trusted advisors and provide clients with a broad portfolio of tax, assurance and advisory services.

A BEST PLACES WORK CULTURE:

To recruit and retain the top-notch talent that differentiates AGH in helping our clients succeed, we consciously work to make and keep AGH an employer of choice. We provide our employees with a culture of learning and development, contribution, collaboration and community involvement. AGH has been named one of the 100 Best Accounting Firms to Work For by Accounting Today and Best Companies Group on nine occasions. No other firm in the region has earned so many consecutive placements on this distinguished list.

POSITION SUMMARY:

Provides office services by implementing administrative systems, procedures, and policies, and monitoring administrative projects. Performs client service duties and related marketing projects. Trains new client service associates on all client-service procedures. Delegates lower-tier duties appropriately and monitors task completion for quality control.

Performs a variety of administrative functions including filing and data entry and may assist with overflow work from various tasks assigned to others. Performs a small amount of oversight on newer client service associates.

ESSENTIAL RESPONSIBILITIES:

- Performing account opening and service functions for top tier clients
- Prepare account reports for top tier client meetings
- Manage RMD client list and monitor completion of withdrawals
- Plan client and prospect events
- Lead operational projects delegated by management (i.e. client survey’s etc.)
- Monitor and resolve all ClientWorks client notifications
- Monitor CRM tool and keep CRM updated with ClientWorks
- Delegate the scheduling of all client meetings, assisting when needed
- Delegate the electronic filing of client and office documents, assisting when needed
- Provide any additional assistance need to service all clients
- Quality control of all delegated tasks

QUALIFICATIONS:

- Associates Degree in Business or related area preferred
- Previous banking experience required; and/or experience with investments
- Proficiency with MS Office (Word, Excel, Outlook)
- Proficiency in logging client-related communication into CRM
- Excellent communication skills, written and verbal
- Prioritization and problem solving skills
- Attention to detail
- Delegation of appropriate duties

WHY WORK FOR US:

At AGH, you will find an environment where good work is rewarded, and growth is valued. AGH offers competitive wages to qualified individuals and the opportunity to grow professionally and personally through diverse work experience and formal training. Our top five people initiatives are:

- A challenging variety of work in a continuous learning environment
- Career/life integration
- Flexible work environment with great opportunity for advancement
- Ability to make a difference with clients and influence the AGH culture
- Individualized career pathing