

Meridian Financial Partners is a growing financial advisory firm in Warrenton, Virginia. We provide our clients with financial peace of mind by creating a clear financial path towards their life goals. We are seeking a dynamic, outgoing and client-oriented individual to add to our team. You will be responsible for providing administrative support to our team and delivering excellent customer service to our clients. This is a client-facing role in which you will be responsible for handling client onboarding tasks, management of client relationships, and marketing for prospective clients. We provide competitive pay, excellent benefits, and on-the-job training. Your next career awaits!

Title: Client Service Associate

Job Function: Administrative, Client Services

Employment Type: Full time; Exempt

Benefits: Yes

Position Summary

You will perform various customer service and office support duties, including answering the phone, greeting clients, preparing documents, and managing incoming and outgoing mail. You will work as part of a team to deliver our clients an exceptional client experience. You must be detail-oriented, organized, and able to prioritize work. Excellent communication skills and a positive attitude are required as you will be the first point of contact for our clients. The ability to work collaboratively as part of a team is required. Proficiency in Microsoft Office is preferred.

Qualifications:

- High school diploma or GED
- Excellent communication skills
- Detail oriented
- Previous customer service experience preferred
- Proficiency in Microsoft Office preferred

Please send your cover letter and resume to accounting@meridianfinancialpartners.com
Find out more about our firm at www.meridianfinancialpartners.com