MERIDIAN
Financial Partners
Clarify the path. Enjoy the journey.

Position Description

Title: Client Service Associate

Reports to: Operations Manager

Benefits: Yes

Status: Full time

About Meridian Financial Partners

Headquartered in Warrenton, Virginia, Meridian Financial Partners provides holistic financial solutions to individuals and organizations nationwide. The firm offers deep expertise and services in investment management, financial planning, and strategic integration of financial resources.

Meridian is one of the rare few that offers completely unbiased guidance and solutions to help clients create and manage a clear financial path to their life goals. The firm's partners have earned the unwavering trust of many long-term clients, who enjoy financial peace of mind as a result of the knowledge, customized care and—most especially clarity—that Meridian consistently delivers.

Position Overview

This position is a salary plus benefits position that is focused on client service and operational support of the Meridian advisory team. We are looking for someone with the following skills and characteristics:

- Can multitask and manage overlapping projects
- Great problem solver and can take a project from start to completion
- Organized, detailed and very process-oriented
- Goal-oriented team player
- Likeable and connects easily with others
- Can take initiative and get things done

About You

You are very organized and enjoy a job done well. You want to be an important part of a successful, positive and fun team, and love helping people. You will help us deliver fearless, engaging, and productive client experiences, by professionally communicating with our team, clients and prospects. You are committed to growing a portfolio of happy clients by excellent service, and you are willing to support our service offering by assisting with client service and operational functions.

Job Description and Responsibilities

The Client Service Associate will work with our Operations Manager to deliver excellent service to the Advisory team and clients of Meridian. Responsibilities include:

- Assist client and advisory team with all non-advisory questions and paperwork such as, processing all forms and applications including, opening accounts, account address change, and other online applications necessary to process clients' business transactions
- Maintain client files, data entry, scanning, and filing
- Assist Back-Office support initiatives and/or core projects that support Advisory teams
- Maintain CRM software and contact management database to keep current for sorting, reporting, scheduling, fee tracking and marketing purposes
- Track client service issues and new business transactions in progress and report on a weekly basis
- Handle all non-advisory tasks for the professional advisory team
- Troubleshooting issues and escalating when necessary
- Scheduling and managing calendar and appointments
- Handling routine compliance administration tasks

Qualifications

- Development in processes and client service support
- College Degree preferred

Salary and Benefits

- Competitive pay
- Team based incentive plan
- Medical and dental insurance benefits
- Retirement plan match
- Paid vacation