



## Position Description

**Title:** Client Engagement Lead

**Reports to:** Director of Operations

**Benefits:** Yes

**Status:** Full time; Onsite in our Warrenton office

## 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 unique 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 is a full-time, salary plus benefits position focused on creating exceptional experiences for every client, guest, and prospective client who interacts with Meridian Financial Partners. This role serves as the welcoming face of the firm while coordinating client engagement initiatives, supporting advisors, and ensuring our office reflects the high standard of service our clients expect. We are looking for someone with the following skills and characteristics:

- Exceptional customer service and hospitality mindset
- Strong organizational and project coordination skills
- Excellent written and verbal communication
- Attention to detail and follow-through
- Ability to manage multiple priorities with professionalism
- Positive attitude and collaborative spirit

## About You

You genuinely enjoy helping people and creating meaningful experiences. You naturally anticipate needs, stay organized, and thrive in a fast-paced environment where every day is different. You take pride in creating a welcoming atmosphere, building relationships, and ensuring details never fall through the cracks.

You enjoy working closely with a collaborative team and are energized by supporting both clients

and coworkers. You are proactive, resourceful, and always looking for ways to make processes, events, and client interactions even better. You are excited to work onsite in our Warrenton office alongside the Meridian team.

## **Job Description and Responsibilities**

The Client Engagement Leads will support Meridian's advisors, clients, and team through the following responsibilities:

### **Client Experience**

- Serve as the welcoming first point of contact for clients and visitors, managing incoming calls and creating a warm, professional first impression.
- Coordinate client appreciation initiatives, including gifts, milestone celebrations, and other meaningful client touchpoints, while maintaining accurate engagement records within firm CRM systems.
- Support new client onboarding and help ensure a seamless, consistent client experience.

### **Events, Community & Office Operations**

- Coordinate client appreciation events, educational workshops, lunches, and other firm events, including logistics, vendor management, invitations, and follow-up.
- Represent Meridian at community and networking events while supporting marketing initiatives and strengthening the firm's presence in the community.
- Maintain a professional, organized office environment by coordinating meeting spaces, supplies, mail, refreshments, scheduling, and other daily office operations.

### **Advisor & Business Support**

- Respond to prospective client inquiries and coordinate a professional, timely introduction to the Meridian advisory team.
- Prepare meeting materials and provide administrative support that enhances advisor efficiency and client service.
- Track all prospect sources and pipeline activity, from initial inquiry through close and then on through transition to advisory team member. Report status to operations and advisory team weekly. Report metrics and trends to the Director of Operations monthly.

## **Qualifications**

- Associate's or Bachelor's degree preferred, or equivalent professional experience.
- 2-5 years' experience in client service, hospitality, office administration, or a related field.
- Experience working in a professional office environment preferred.
- Proficiency with Microsoft Office; CRM experience (Redtail, Hubly, or similar) is a plus.

## **Salary and Benefits**

- Annual Salary Range: \$65-70K
- Team based incentive plan
- Medical and dental insurance benefits
- Retirement plan match
- Paid vacation