Position Description

Title: Client Services Support

Reports to: Client Services Manager

Salary Range: $55,000-$70,000 annually with potential for annual bonus based on firm profitability and employee performance.

Benefits:

- Medical, Dental, and Vision insurance: 80% employer paid premiums for employee and 50% employer paid premiums for dependents. Two plan options: High deductible with HSA and low deductible plan.
- 100% employer paid premium for Group Term life, voluntary employee paid life and AD&D Insurance.
- 401(k) with 100% company match up to 4% with both Traditional and Roth options.
- Voluntary long-term Disability Insurance.
- Paid time off: 17 days annually for new hires, two half-days per month, 10 holidays plus 1 floating holiday, birthday leave, bereavement leave, 16 hours per year of volunteer leave.
- 100% remote work schedule.
- Certification and designation sponsorship, tuition reimbursement up to $5000 annually.
- Additional benefits: fitness membership reimbursement, internet reimbursement, one month paid sabbatical after 5 years of employment, employee home loan program, donation matching, recognition program, employee referral bonus, and company events.

NWAM, LLC dba Northwest Asset Management is committed to fostering a diverse, inclusive, and collaborative workplace where every employee is valued and respected. We believe diverse perspectives and experiences strengthen our team and positively impact the services we provide to our clients and advisors. We welcome individuals of all backgrounds and encourage employees to bring their unique perspectives, experiences, and ideas to work. Military veterans and spouses are highly encouraged to apply.

Northwest Asset Management is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability, protected veteran status, or any other characteristic protected by applicable law.

NWAM, LLC dba Northwest Asset Management is an SEC Registered Investment Adviser.

Job Summary

The Client Services Support professional will assist the Back Office Support Team with various administrative tasks, client accounts, account openings, and procedures. The candidate will work closely with Client Services Associates and advisors to ensure all work is thoroughly completed with minimal errors. This position will use a variety of computer programs including CRM, Microsoft Office, and custodian platforms.

Why Join Us

At Northwest Asset Management, you'll be part of a collaborative, close-knit team where your work has a direct impact on our clients, advisors, and the success of the firm. We value initiative, attention to detail, and a willingness to find better ways of doing things—and we give our employees the support and flexibility to grow.

As a member of our Client Services team, you'll have the opportunity to:

- **Make an impact:** Play an important role in delivering a high level of service to our clients and supporting the advisors who serve them.
- **Grow your career:** We invest in professional development through certification and designation sponsorship and annual tuition reimbursement.
- **Enjoy flexibility:** Work 100% remotely while remaining connected to a collaborative and supportive team.
- **Be part of a great team:** Work in a small-company environment where employees are encouraged to share ideas, take initiative, collaborate, and contribute beyond their individual responsibilities.
- **Build for the future:** Take advantage of a competitive benefits package, including a 401(k) with company match, comprehensive medical, dental, and vision coverage, paid time off, and additional employee-focused benefits.
- **Be recognized and supported:** We celebrate employee contributions through recognition programs, referral bonuses, donation matching, company events, and other programs designed to support our employees both professionally and personally.
- **Make a difference:** We are committed to diversity, inclusion, community involvement, and creating a workplace where employees can bring their unique perspectives and experiences to work.

If you're looking for a role where you can build your expertise, contribute to a collaborative team, and make a meaningful difference for clients, we'd love to hear from you.

Requirements and Qualifications

- Bachelor's degree from an accredited college or university.
- 2+ years of experience in the investment or finance industry required.
- Securities Industry Essentials (SIE) exam required within six months of hire.
- Strong organizational and project coordination skills, with the ability to prioritize multiple assignments, manage competing deadlines, and maintain a high level of client service.
- Strong attention to detail, problem-solving skills, and sound judgment, with the ability to work effectively under pressure and resolve issues appropriately.
- Excellent written and verbal communication skills, with the ability to communicate clearly, concisely, and professionally.
- Ability to handle confidential and time-sensitive information with a high level of professionalism, discretion, and judgment.
- Proficiency with Windows-based software, including Microsoft Word, Excel, PowerPoint, and Outlook.
- Ability to work both independently with minimal supervision and collaboratively in a team environment, including proactively sharing responsibilities, supporting team members, and knowing when to seek guidance.
- Self-motivated and proactive, with the initiative and creativity to identify opportunities to improve processes and streamline tasks.
- Strong coaching, listening, and interpersonal skills, with the ability to work successfully in a small-company environment.

Duties and Responsibilities

The Client Services Support professional will work closely with the Back Office and Client Services teams to support efficient, accurate, and timely processing of client and advisor requests. Key responsibilities include:

- Support the Back Office and Client Services teams with daily administrative and operational tasks.
- Prepare, process, and track account opening, account transfer, and other client documentation.
- Create and track CRM requests for wires, ACH transactions, journals, checks, and other account-related requests through completion with the custodian.
- Prepare documents for client and advisor signature, including completing and tracking DocuSign requests.
- Process, organize, file, and maintain client and advisor documentation in accordance with firm procedures.
- Follow up on outstanding paperwork and requests to ensure timely completion and resolution.
- Assist with the onboarding of new advisors and clients, including coordinating required documentation and follow-up.
- Escalate issues, exceptions, and complex requests to the appropriate team member or department.
- Respond to telephone calls and provide professional and timely assistance to clients, advisors, and internal team members as appropriate.
- Follow established operational procedures and contribute to process improvements that promote accuracy and efficiency.