3033 Campus Drive, Suite N145, Plymouth, MN 55441

Echo Wealth Management is seeking an experienced Client Services Associate with a record of accomplishment and a desire to contribute as part of a growing firm. You will be responsible for supporting our team in an administrative and operational capacity. You will contribute significantly to providing an unparalleled client experience and play an integral part in the growth of our team. Your commitment to building a long-term career in operations will be rewarded with potential equity compensation. The career path is to become our Operations Manager eventually. Currently, 40% of the time is required in the office and 60% is flexible/work from home.

About Echo Wealth Management

Echo Wealth Management is an independent, boutique wealth management firm located in Plymouth, Minnesota, that takes the complexity out of wealth management. We offer integrated, comprehensive solutions that address every facet of our client's financial lives. We do this by building the highest trust, integrity, and respect while constantly collaborating using a team approach.

We serve high net worth clients by creating a customized client portal Echo Dashboard for each household to see financial data in one secure place. Our clients value our high level of attention to detail, responsiveness to their needs, and professional style. At Echo Wealth Management, you will work with a team of trained professionals whose focus is to help clients define and reach their goals. Our employees enjoy working in a Class A office building that offers a café, a fitness center, state-of-the-art technology, and amenities that enhance our work environment. Development and training of our firm’s talent is a top priority. A team-building trip to an exclusive resort will occur in February 2022.

Echo Wealth Management is an equal opportunity employer. We offer a competitive compensation and benefits package including salary (10% above industry average); a cash bonus plan; a 401(k) plan with a generous employer matching; firm-wide profit sharing; group health insurance plan; flexible hybrid work schedule; a continuing education reimbursement plan, 15-day pay-time-off per year in addition to 9 holidays.

Primary Responsibilities

- Interact daily on the phone and in-person with prospective and existing clients, including handling basic inquiries
- Schedule and coordinate meetings, events, and appointments for wealth managers
- Serve the client by setting up accounts and ensuring their funds transfer accurately
- Complete necessary financial paperwork to change beneficiaries and update addresses
- Build trusted client, wealth manager, and vendor relationships through a commitment to timeliness, accuracy, effective communication, and an engaging interpersonal style

- Utilize CRM system (Salesforce) for daily tasks, tracking and documentation of client data, and internal updates to currently assigned work
- Respond to daily communications from clients regarding account maintenance and other intraday account servicing responsibilities
- Collaborate with Wealth Managers regarding account questions, service requests, and all other matters
- Maintain our paperless system by filing electronic documents timely according to our firm's processes
- Maintain our email newsletter list by using Mailchimp.com
- Participate in special projects or assignments as needed working with wealth managers to solve complex issues that may arise
- Assist in the billing of financial planning fees and investment management fees
- Work with wealth managers to facilitate the onboarding process for new clients
- Manage the office by ordering supplies and handling mails

Required Knowledge, Skills and Abilities

- Exceptional oral, written, and interpersonal communication skills
- Excellent organizational and time management skills
- Pleasant, professional, and positive demeanor
- Proficiency in prioritizing multiple tasks at one time
- Ability to work under pressure in a fast-paced environment
- Flexibility and adaptability in an environment of complexity and change
- Unwavering ethics and commitment to acting in the best interest of clients
- Resourcefulness and ability to independently resolve questions and issues
- Motivated, team-oriented, and committed to providing a superior level of client service
- Self-disciplined with a commitment to quality, attention to detail, and accuracy
- Roll-up-sleeves, can-do, no-ego attitude fueled by intellectual curiosity
- Proficiency in MS Excel, Word, Outlook, and Power Point

Education and Experience

- High school diploma required; associates degree or bachelor's degree preferred
- 3+ years of financial administration and customer service-related experience

Please direct your cover letter and resume with salary requirements to info@echowm.com.