Client Services Representative

Position Summary

LCA is looking to fill a Client Services Representative position. This position is reserved for the highly organized, analytical, and process driven professional. The CSR is responsible for providing front-line service to financial advisors and their clients. This person must be articulate, seasoned in the investment industry, and be able to work well in a collaborative team environment.

Duties and Responsibilities

- Identify and respond to the needs of clients while cultivating long-term relationships
- Optimize the client and advisor experience
- Familiarize new advisors with LCA procedures
- Evaluate and prioritize workload
- Scan and index documents in secure document management software
- Process Trade Requests and Distribution Requests in a timely and accurate manner
- Assist team with special projects
- Onboarding of new accounts and business lines
- Initiating transfers of assets
- Directly communicate with advisors regarding account activity
- Generating new account documents
- Provide advisors and clients with website navigation
- Administer support with answering phones and properly directing them to the correct individuals within the firm

Skills and Knowledge

- Ability to work efficiently in an unpredictable/fast paced environment
- Proficient in Microsoft Office (Outlook, Word, Excel, and PowerPoint)
- Excellent verbal and written communication skills
- CRM database experience (preferably Salesforce)
- Strong knowledge of securities industry
- Results driven and able to set priorities with the ability to take initiative

Education and Experience

- BS, BA Degree or equivalent work experience
- 3-5 years of financial services experience
- Acute attention to detail, organization, and deadlines
- Securities License preferred (Series 65 or 66)

Benefits

- Medical, Dental and Vision coverage
- Employee Benefits
- 401k

Please email resume and cover letter to **jnewman@lindnercapital.com.**