Client Service Associate

Cascade Financial Management, Inc. is a Broker-Dealer and Registered Investment Advisory that provides highly customized and integrated wealth management solutions. Cascade provides institutional access and advice to private clients through an open architecture business model. Cascade's consultative process focuses on creating a comprehensive plan based on the client's goals and objectives. Our advisors work closely with other professionals and strategic alliance partners to deliver wealth management strategies to help clients achieve their goals and objectives.

Cascade is a dynamic and growing company excited by our future. At Cascade, culture is very important. We maintain a fun, yet challenging collaborative environment focused on growth and lifelong learning. Cascade has a small business feel with institutional like capabilities and infrastructure which makes Cascade a unique player in the wealth management arena. We are always eager to meet prospective additions to our team. Successful people from within the investment industry, regardless of their geographic location, are encouraged to apply.

Cascade Financial Management, Inc. is currently seeking an experienced Client Service Associate.

Client Service Associate:

- Works in a team environment (Client Service Team) and is one of the primary points of contact for all client and advisor service related needs
- Handles incoming calls and inquiries
- Provides high quality, high touch service to clients and advisors
- Responsible for maintaining and building client relationships
- Assists in managing CRM system, facilitates scheduling and tracking via Smart Office
- Helps manage documentation workflow and tracking via Laserfiche and Smart Office
- Initiates, tracks and completes client service requests via back office systems
- Prepares, sets up and maintains account paperwork and agreements
- Tracks and documents client service standards for completeness and accuracy
- Coordinates system integrations and process workflows
- Assists in organizing meetings and events
- Facilitates wealth management process and assists with client deliverables
- Assists with compliance, operations and client related projects

Requirements
Minimum 5 years client service experience is required
A preference extended to candidates with financial services background

To apply please forward resume and salary requirements to John Van Sant at jvansant@cascade-inc.com.