

**Excellent benefits package! Great team and work environment! Competitive compensation!**

We are currently conducting a search for a **Client Service Associate** with a focus on administrative and operational support functions. Our client is based in **Henderson, Nevada** and provides financial services primarily to high net worth individuals and families, including financial planning, investment strategy and implementation.

As Client Service Associate, you are the first point of contact for clients and visitors in the office and on the phone. You will assist the team with all non-sales related functions (clerical/administrative work), prepare meeting documents and other materials, utilize group's various applications (Outlook, Schwab, Salesforce) to obtain account information and execute service requests, respond to questions regarding accounts, policies and procedures, review daily activity and reconcile current client activity, fund transfers and previous day's activity to ensure accuracy, process client requests (wires, checks, journals), process new accounts by obtaining all necessary approvals and ensuring all client documentation is returned, completed and approved, assist with establishing online access for statements, confirms, proxy materials and other services, attend compliance and continuing education training sessions as required by regulatory agencies and the firm, prepare client correspondence, obtain necessary management approvals and transmit, and other responsibilities as needed.

**Do you meet the following requirements?**

- BA/BS degree preferred in Business/Marketing/Communications or related field
- Strong Microsoft Office competency; Salesforce experience a plus
- Excellent customer facing skills
- Strong written and verbal communication skills
- The ability to accomplish a variety of tasks in an efficient, organized manner

If so, we encourage you to apply with a cover letter, resume and salary requirements via email to [work@prismgmg.com](mailto:work@prismgmg.com).

**No phone calls please. No agencies.**