Client Service Associate

Location: Waco, TX
Firm: ClearVista Financial
Job Type: Full-Time / Salaried

Build a Career, Not Just a Job

ClearVista Financial is seeking an experienced Client Service Associate who is passionate about delivering an exceptional client experience and thrives in a professional, team-oriented environment.

This is a key role within our growing financial services firm. The Client Service Associate serves as the operational backbone of the practice, ensuring clients receive outstanding service while supporting advisors with account management, client communications, and practice operations. The ideal candidate is highly organized, detail-oriented, proactive, and experienced in financial services. This position offers a clear path for professional growth within a firm committed to developing long-term team members.

Responsibilities

Client Service and Relationship Management

- Deliver a concierge-level service experience for clients and prospects.
- Serve as a primary point of contact for client service requests.
- Proactively communicate updates regarding account transfers, service requests, and pending transactions.
- Build and maintain trusted relationships through responsive, professional communication.

New Account and Service Processing

- Prepare, process, and track new account applications and related paperwork.
- Coordinate account transfers, rollovers, beneficiary updates, and maintenance requests.
- Monitor pending business and follow through to completion.
- Ensure all documentation is accurate, complete, and compliant.

Advisor Planning and Support

- Prepare client meeting materials, reports, and account summaries.
- Gather account values and planning information for client review meetings.
- Assist advisors with ongoing planning projects and client communications.
- Support educational workshops, client appreciation events, and marketing initiatives.

CRM and Operations Management

- Maintain accurate client records within the firm's CRM.
- Track workflows and service requests to ensure timely completion.

- Generate weekly reports on new business, service activity, and operational metrics.
- Identify opportunities to improve efficiency and streamline processes.

Compliance and Administrative Support

- Maintain organized client records and filing systems.
- Assist with advisor licensing, appointments, and regulatory documentation.
- Support office operations and team initiatives as needed.
- Adhere to all compliance and confidentiality requirements.

Who Thrives Here

The ideal candidate:

- Loves helping clients and solving problems.
- Takes ownership and follows through.
- Enjoys creating organization and efficiency.
- Communicates professionally and confidently.
- Wants to build a long-term career in financial planning and wealth management.
- Shares our commitment to integrity, service, and putting clients first.

Qualifications

Required

- 3+ years of client service or operations experience in financial services, wealth management, insurance, banking, or brokerage environments.
- Exceptional organizational and time-management skills.
- Strong written and verbal communication abilities.
- High attention to detail and commitment to accuracy.
- Proficiency in Microsoft Office Suite and CRM software.
- Ability to manage multiple priorities with minimal supervision.

Preferred

- Experience in an RIA, financial planning, or wealth management firm.
- Knowledge of account transfers, retirement accounts, and investment account servicing.
- Experience with Redtail, Wealthbox, Orion, eMoney, MoneyGuidePro, Schwab, Fidelity, or similar platforms.
- Securities or insurance licensing is a plus.

Compensation and Benefits

Compensation

- Base salary: $50,000 - $65,000, commensurate with experience, qualifications, and industry background.

- Performance-based bonus opportunities tied to individual contributions and overall firm performance.
- Annual compensation reviews based on performance, growth, and increasing responsibilities.
- Defined career advancement path.

Benefits

- Health Insurance
- Dental Insurance
- Vision Insurance
- Employer-sponsored retirement plan
- Generous Paid Time Off (PTO)
- Paid holidays
- Opportunities for professional development, licensing support, continuing education
- Technology and training resources to support success in the role

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Career Advancement Path

At ClearVista Financial, we believe in developing talent from within. This role offers a defined path for growth, including opportunities to advance to:

- Senior Client Service Associate
- Operations Manager
- Financial Planning Associate
- Associate Advisor
- Lead Advisor

We invest in the professional development of our team through mentoring, training, and support for industry education and licensing.

To Apply

If you're looking for a career with growth opportunities, meaningful client relationships, and the chance to be part of a growing financial services firm, we'd love to hear from you. To apply, please submit your resume and a brief cover letter expressing your interest in the role and alignment with the firm's values to **mtrice@clearvistafinancial.com**.