



It takes a village to provide fee-only financial advisors with high-touch and high-impact operational support. That's where you come in. Village Financial Services is seeking a **Virtual Client Services Associate** to join our team and act as operational partners to our valued advisors.

Responsibilities at a Glance:

- Expertly manage the client onboarding process.
- Provide exceptional client service by promptly addressing inquiries and resolving issues through clear communication.
- Streamline account opening process and assist clients with technical matters such as setting up online access or linking accounts.
- Own financial data gathering, organizing, and analyzing before, during, and after client meetings.
- Consistently leverage your advisors' CRM, maintaining accurate and up-to-date contact records & tasks/workflow steps, and generating reports as needed.
- Be proactive in identifying and implementing improvements to operational processes and workflows to enhance efficiency and client satisfaction.
- Manage client billing procedures.
- Ensure operations adhere to client and industry compliance and regulatory requirements.
- Stay updated on industry trends and best practices.

Desired Superpowers:

- Critical thinking skills
- Solution-oriented mindset
- Self-directed yet able to collaborate
- Curious and eager to learn
- A sense of humor

More About You:

- 1+ year of financial services experience
- Charles Schwab (Advisor Center) or Fidelity (Wealthscape) experience

Nice to Haves for this Role:

- Experience with a variety of FinTech
 - Visit the [Services page](#) on our website to view the tools our advisors use the most
- Previously obtained Series license(s)

Pay Range: \$52,000-\$70,000 annually for FT employees, dependent on experience, with opportunity for growth

Are you ready to join our Village? Upload your resume via [our job application portal](#) today.