



Village Financial Services is seeking a **Virtual Client Services Associate** to join our team and serve as a Fractional CSA to our advisor clients. In this role, you will support multiple advisory firms, each with its own systems, workflows, and technology stack. This position is **ideal for someone who can shift gears easily, stay organized across multiple priorities, and thrive in a dynamic environment** where no two days look exactly the same.

Client Service & Relationship Support

- Serve as a primary operational support contact for assigned advisory firms and their clients
- Assist advisors in delivering a high-touch client experience through timely and accurate operational support
- Prepare for client meetings by gathering reports, account data, and planning materials
- Draft client communications related to account servicing, paperwork, and follow-up requests

Custodial Account Servicing

- Prepare and process custodial paperwork for account openings, transfers, and maintenance requests
- Support ACAT transfers, money movements, beneficiary updates, and other account servicing requests
- Work within Schwab Advisor Center and Altruist platforms
- Monitor requests through completion and follow up with custodians as needed to ensure timely processing
- Maintain documentation of all servicing activities in the firm's CRM

CRM Management & Documentation

- Maintain accurate client records within CRM systems (e.g., Advyzon, Wealthbox, Redtail)
- Document client interactions, service requests, and account changes in accordance with firm procedures
- Execute and maintain CRM workflows to support operational consistency
- Track outstanding service tasks and ensure timely completion

Team Collaboration

- Collaborate with advisors, their staff, and their vendors to ensure seamless client servicing
- Participate in internal training and team meetings to maintain industry and platform knowledge
- Share best practices and operational insights across the Village team

More About You:

- 2+ years of operations and/or CSA experience for an RIA
- Must be fluent in Charles Schwab (Advisor Center)

Nice to Haves for this Role:

- Experience with a variety of wealth tech, particularly:
 - Advyzon, Wealthbox, and/or Redtail
 - RightCapital, eMoney, and/or Holistiplan
 - Orion, Tamarac, and/or Capitect
 - Hazel, Jump AI, Zocks, Zapier, ChatGPT, Claude, etc.

Pay Range: \$58,000-\$70,000 annually for FT employees, dependent on experience, with opportunity for growth

Benefits: For FTEs after 90 days of employment - 10 Paid NYSE Holidays, 5 days of paid time off, SIMPLE IRA with 3% dollar-for-dollar employer match, monthly stipend for health insurance