VILLAGE FINANCIAL SERVICES	**Fractional Client Services Associate** *Virtual | Full-Time or Part-Time | Fee-Only RIA Support*

More than just an admin.

Village partners with independent advisory firms to strengthen operations, improve systems, and scale with confidence.

About Village Financial Services

Village Financial Services is a virtual, fractional operations firm built exclusively for fee-only RIA firms. We partner with independent advisors who want high-caliber, dedicated client service support without the overhead of a full-time in-house hire. Our Fractional CSAs serve multiple advisory firms simultaneously, delivering consistency, operational precision, and genuine care to every client relationship we touch.

Our Mission

To give fee-only RIA firms access to the best operational support in the industry, delivered with the professionalism and warmth that their clients deserve.

What Makes Us Different

Fee-Only Focus	Virtual by Design	Fractional Done Right	Team Behind You
We serve only fiduciary, fee-only firms. No broker-dealers. No commission-based practices.	Our entire model is built for remote delivery. 100% virtual, 100% professional.	VFS FCSAs are trained, supported, and held to consistent standards across every advisor relationship.	You are never alone. VFS provides a Team Lead, peer community (the Beehive), ongoing training, and operational support.

ROLE OVERVIEW

Role Title	Fractional Client Services Associate (FCSA)
Type	Virtual / Remote, 100% work-from-home
Schedule	Full-time (40 hrs/wk) or Part-time (20 to 30 hrs/wk)
Advisors Served	4 to 7 advisory firms simultaneously (retainer model)
Starting Rate	$24/hr during the pre-billable training period (minimum 3 weeks, prior to first firm assignment)
Post-Graduation Pay	$58,000 to $70,000 annually, based on tier and tenure
Benefits (FTE, 90 days)	10 NYSE holidays | 5 PTO days | SIMPLE IRA w/ 3% match | Health stipend

ABOUT THE FRACTIONAL CSA ROLE

The Fractional CSA Role: What You Are Actually Signing Up For

This is not a traditional CSA role. You will not report to one advisor, sit in one office, or work inside one technology stack. You will manage 4 to 7 distinct advisory relationships simultaneously, each with its own clients, CRM, preferences, and service rhythms. You shift between them daily, sometimes within the same hour.

This model works because the advisors who hire through VFS are not looking for someone to manage. They are looking for someone who takes ownership, communicates proactively, and delivers excellent work without being asked twice.

If you thrive on variety, operate well independently, and take real pride in operational precision, this role will feel like a fit. If you need close supervision or a single defined routine, it may not be the right match.

The Four Dimensions of This Role

Virtual	You work entirely from home. Client meetings, advisor check-ins, and team collaboration happen through video, phone, and email.
Fractional	You are shared across multiple firms. Each advisor gets a defined number of hours per month, not a full-time dedicated resource.
Retainer-Based	Advisors pay a monthly retainer (typically 20, 30, or 40 hours per firm). Your time is tracked in Ruddr and tied directly to client invoicing.
Multi-Client	You support 4 to 7 advisors at once. Each firm has different clients, different systems, and different expectations. Adaptability is the job.

WHAT YOU WILL DO

As an FCSA, no two days are identical. You are simultaneously the operational backbone for multiple independent advisory firms: managing tasks, servicing accounts, supporting client meetings, and keeping everything moving with precision and warmth.

Client Service and Operational Support

- Serve as the primary operational point of contact for 4 to 7 assigned RIA firms and their end clients
- Prepare client meeting materials: account summaries, planning reports, portfolio data, and agenda documents
- Draft and send client communications related to account servicing, paperwork, and follow-up requests
- Support advisors in delivering a high-touch client experience through timely, accurate, and proactive operational work
- Manage a firm-specific CSA inbox for each advisor, triaging and responding according to firm protocols

Custodial Account Servicing

- Prepare and process custodial paperwork for account openings, transfers (ACAT/TOA), and maintenance requests
- Support money movements, beneficiary updates, RMD distributions, QCDs, Roth conversions, and other account servicing requests
- Work fluently within Schwab Advisor Center and Altruist; follow up with custodians through completion
- Prioritize distributions and money movements as the highest-urgency daily tasks
- Maintain documentation of all servicing activities in the firm's CRM

CRM Management and Documentation

- Maintain accurate client records in Advyzon, Slant, Wealthbox, and/or Redtail depending on the firm
- Write clear, consistent CRM notes using the Big 3 format: What You Did, What's Next, and When
- Execute and maintain CRM workflows to ensure no task falls through the cracks
- Track outstanding tasks and follow through to completion; escalate to Team Lead first, then advisor, when needed
- Log time entries in Ruddr accurately and in real time to support client invoicing

New Client Onboarding

- Coordinate paperwork, disclosures, and account opening documents for new advisory relationships
- Build out CRM records, service calendar entries, and workflow templates for new clients
- Support the discovery and recommendation phases with document collection and data entry
- Ensure clients feel organized and well-supported from their very first interaction

Review Meeting Support

- Prepare surge schedules and review meeting materials for quarterly or annual client reviews
- Generate reports from planning tools (RightCapital, eMoney, Holistiplan) for advisor-led meetings
- Complete all follow-up tasks assigned during review meetings and document outcomes in CRM
- Update Holistiplan tax scenarios, RMD calculations, and year-round planning documents post-meeting

Advisor Relationship Management

- Participate in a kickoff call and first-90-day onboarding period for each new advisor relationship
- Maintain regular touchpoints with advisors, especially during the first 90 days
- Proactively surface issues, flag pending items, and communicate status updates without being asked
- Manage competing priorities across 4 to 7 advisors using structured daily task prioritization

WHAT YOU BRING

Required

- 2+ years of operations and/or CSA experience in an RIA or financial planning firm
- Fluency in Charles Schwab Advisor Center: account maintenance, digital workflows, and move money tools
- Experience with at least one major wealth management CRM: Advyzon, Wealthbox, or Redtail
- Excellent written communication: you write professional, clear client-facing emails without heavy editing
- Strong personal organization: you manage multiple priorities, track your own deadlines, and follow through
- Comfortable working independently in a fully virtual environment

Nice to Have

- Experience supporting multiple RIA firms simultaneously (fractional or multi-advisor role)
- Altruist platform experience
- Familiarity with financial planning tools: RightCapital, eMoney, and/or Holistiplan
- Experience with AI tools in a professional context, particularly Claude (by Anthropic), for drafting, summarizing, and operational workflows
- Proficiency with Microsoft Outlook, Excel, and calendar management across multiple firms
- Exposure to Orion, Tamarac, Capitect, or other portfolio management platforms
- Familiarity with DocuSign, especially within Schwab's digital workflow environment

THE VFS WAY: WHAT SUCCESS LOOKS LIKE

Proactive, Not Reactive	You do not wait to be asked. If you see something coming, you get ahead of it.
Ownership Mentality	When something goes wrong, you own it, fix it, and move forward. No blame-shifting.
Detail Precision	You catch the small stuff: the missing middle initial, the wrong account number, the overdue task.
Warm Professionalism	Clients trust you. Advisors rely on you. You show up as competent and genuinely caring.

HOW WE WORK

- You will be assigned 4 to 7 advisors on monthly retainers (typically 20, 30, or 40 hours per firm per month)
- Each advisor relationship has its own CRM, service calendar, communication style, and client base. You flex between them daily.
- Your Team Lead is your first point of escalation for anything you are unsure about. Advisors are not your first call.
- You are expected to be proactive in surfacing issues, anticipating upcoming tasks, and completing work before being asked.
- Performance is measured by accuracy, task completion, quality of client experience, and time logged.

A Note on AI and Claude

At VFS, we actively use Claude (by Anthropic) as part of our daily operations: formatting time entries, drafting client communications, researching account questions, and more. Our FCSAs who are comfortable prompting, evaluating, and applying AI output in a professional context are faster, more autonomous, and better operators.

Experience with Claude or other AI tools is a meaningful differentiator in this role. You do not need to be an expert. Curiosity and a genuine willingness to adopt AI as a real work tool is a strong plus.

TO APPLY

Send your resume and a brief note about your RIA operations experience to hello@villagefs.com. Tell us which CRM(s) you have worked in, what your Schwab Advisor Center experience looks like, and what draws you to the fractional model.

We review applications on a rolling basis. We are a small, close-knit team and fit matters as much as experience here.