Client Service Coordinator

Location	Wheeling, WV
Working Style	On-Site
Experience Level	0-2 years
Designation	FPQP® Pursuit Encouraged
Technology	Microsoft Office, Schwab, Fidelity, Orion, RedTail, eMoney
Bonus Offered?	Quarterly incentive opportunity based on firm performance
Benefits Offered	PTO, Medical, Dental, Vision, Disability, Life, 401k
Working Hours	8am-5pm

Position Overview

The Client Service Coordinator serves as the first point of contact for clients, prospective clients, and visitors, creating a welcoming and professional experience that reflects the firm's commitment to exceptional service. This role provides front-office coordination, administrative support, and operational assistance to the Advisory and Client Service teams while ensuring the office operates efficiently on a daily basis.

The Client Service Coordinator plays an important role in supporting client service operations by assisting with scheduling, client communications, account administration, document management, and office coordination. This position is ideal for an organized, detail-oriented professional who enjoys working with people, thrives in a fast-paced environment, and is eager to build a career in the financial services industry. Through responsiveness, professionalism, and a commitment to continuous learning, the Client Service Coordinator helps deliver a consistent and positive experience for both clients and team members.

Typical responsibilities include:

- Serve as the first point of contact for clients, visitors, and prospective clients by providing a welcoming, professional, and service-oriented experience.
- Answer and direct incoming phone calls, manage general office communications, and ensure inquiries are routed promptly to the appropriate team members.
- Coordinate office-wide scheduling, conference room reservations, and client meeting logistics.
- Assist advisors and Client Service Associates with administrative support, client correspondence, document preparation, and routine service requests.
- Prepare, scan, organize, and maintain client documentation in accordance with firm policies and document retention requirements.

- Support client onboarding by gathering required information, preparing paperwork, and coordinating documentation for new client accounts.
- Assist with basic account maintenance requests and administrative tasks under the direction of the Client Service team.
- Maintain office supplies, coordinate vendor deliveries, and assist with general office organization and daily operations.
- Support firm marketing initiatives, client appreciation events, educational seminars, and other firm-sponsored activities as requested.
- Maintain accurate client information within the firm's CRM and document management systems.
- Assist with operational projects, workflow improvements, and other administrative initiatives that support the firm's growth and client service objectives.
- Support compliance initiatives by maintaining organized records, following established procedures, and assisting with administrative compliance activities as assigned.

Typical skills and knowledge requirements:

- Outstanding customer service skills with a professional, friendly, and welcoming demeanor.
- Excellent verbal and written communication skills with the ability to interact confidently with clients, vendors, and team members.
- Strong organizational and time management skills with the ability to prioritize multiple responsibilities while maintaining accuracy.
- Exceptional attention to detail and commitment to producing high-quality work.
- Ability to work proactively, take initiative, and adapt to changing priorities in a fast-paced environment.
- Proficiency with Microsoft Office applications and the ability to quickly learn CRM systems, custodial platforms, and financial services technology.
- Ability to maintain confidentiality and exercise sound judgment when handling sensitive client information.
- Basic understanding of financial services operations and compliance requirements is beneficial but not required.
- Strong interpersonal skills and a collaborative mindset that contributes to a positive team culture.

Typical experience and education requirements:

- Associate's or Bachelor's degree in Business, Finance, Communications, or a related field preferred; equivalent education and experience may be considered.
- Zero to two years of experience in customer service, administrative support, office coordination, or financial services preferred.
- Interest in building a career within the financial services or wealth management industry.
- Financial Paraplanner Qualified Professional (FPQP®) designation or willingness to pursue the designation as career development progresses is encouraged.
- Experience using Microsoft Office and other business software applications; familiarity with CRM systems or financial services technology is a plus.