GARDECAPITAL

Title/Position Available: Client Operations Specialist
Location: Seattle, WA

Description:
Garde Capital is a locally owned wealth management firm providing a roadmap to financial freedom for select Families, Non-Profits, and Small Businesses in the Pacific Northwest. We combine knowledge, integrity, a personal touch, and meticulous attention to detail to provide peace of mind, and customized solutions for our clients. We are seeking a highly motivated, customer-focused Client Operations Specialist to support our rapidly growing firm located in downtown Seattle.

Duties include, but are not limited to:

- Supporting a team of Wealth Managers to assist clients in all aspects of their financial lives.
- Providing administrative support to coordinate with clients' professional advisors, such as their tax, estate planning, insurance, and banking professionals.
- Coordinating the onboarding process for new clients. This includes opening new accounts, initiating inbound transfers, and maintaining client communication throughout the process.
- Fielding incoming calls and providing a high level of proactive service to address client requests and inquiries.
- Initiating and completing all transactions required to fully service existing client accounts. This includes processing wire and ACH transfers and helping clients manage their relationship with the custodian.
- Managing administrative aspects of Salesforce.com applicable to the operations of our firm, and learning to effectively navigate custodial platforms.
- Joining fellow team members in monitoring and maintaining the physical appearance of the office to ensure a great experience for employees and customers.

Requirements:

- Bachelor's Degree.
- 5+ years of professional experience, customer service experience required.
- Interest in finance and wealth management.
- Strong verbal and written communication skills.
- Exceptional organizational skills and the ability to manage workflow prioritization.
- Great attention to detail with an emphasis on resourcefulness and accuracy.
- Skilled in the use of MS office including Excel, Outlook, and Word.
- Self-motivated and team oriented.

Preferred Qualifications:

- Customer service focus. Successful candidate must have good interpersonal skills. They must be willing to put in extra effort to provide customer service that is beyond client expectations. They have a passion for finding new ways to improve client experience.
- Basic knowledge of financial markets and/or securities related experience.
- Experience working with Charles Schwab, Fidelity, or similar brokerage institutions.
- Technology savvy – Possess the skills and knowledge to work with existing technology systems while also having the ability to train others as necessary.
- Ability to problem solve. Our company prides itself on finding new ways to help our clients achieve their goals and provide best in class customer service. Ability to identify inefficiencies or potential problems while developing new processes to meet our client's objectives.
- CRM (client relationship management) software proficiency, specifically Salesforce.com.
- Familiar with Zoom, Teams, and other virtual meeting platforms.

Compensation:

Competitive salary based on experience and opportunity for annual bonuses.
Healthcare paid by company at 75% for employee.
Generous 401(k) Match after 1 year of service.
Profit Sharing eligibility after 1 year of service.
3 weeks paid vacation.

Schedule: M-F: 7am – 4pm. The employee will be working in the office on a daily basis during the training period. Once the training is complete, they will have an opportunity to transition to a flexible schedule of up to two days working remotely each week.

Contact:

Please send resume and cover letter to scott.severs@gardecapital.com.