Client Operations Associate

Garde Capital | Seattle, WA

About the Role

At Garde Capital, wealth management is a process, not an event. We begin with a comprehensive evaluation of each client's full financial picture, create a detailed roadmap, and remain by their side with ongoing reviews, education, and progress updates. Our service model is about more than customer service; it's about lifelong relationships built on trust, competence, and security. It's the Garde Way.

As a rapidly growing $2.5B RIA, we're scaling our client experience and operational foundation while preserving the white-glove hospitality our clients expect.

We are seeking a detail-oriented and motivated **Client Operations Associate** to join our growing firm. This role is ideal for an early-career professional who thrives in a fast-paced environment, enjoys supporting clients and advisors, and is eager to build a long-term career in wealth management.

As a Client Operations Associate, you will work closely with our Financial Advisors and Client Operations Specialists to help deliver a seamless client experience through accurate, timely, and high-touch operational support.

Key Responsibilities

- Provide high-touch service and operational support for prospective and existing clients through phone, email, virtual meetings, and in-person interactions
- Support Financial Advisors and Client Operations Specialists with day-to-day client service needs in a team-based environment
- Prepare and process client onboarding, account maintenance, and service requests with accuracy and attention to detail
- Ensure all client paperwork and documentation meets firm standards and regulatory requirements prior to submission
- Track workflows and follow up on outstanding items to ensure timely completion of client requests
- Provide general office and administrative support to ensure smooth day-to-day operations, including managing office mail, ordering and maintaining office supplies,

coordinating vendor and retail orders, processing invoices and reviewing weekly check logs.

- Draft client correspondence, forms, and reports to assist with servicing and relationship management
- Assist in preparing client-specific reports and summaries for advisor review and meetings
- Maintain accurate client records and notes using the firm's CRM and portfolio systems
- Support marketing and client engagement efforts, including client events, seminars, and firm communications
- Participate in special projects and process improvement initiatives as the firm continues to grow

Qualifications & Skills

- Bachelor's degree required
- Series 65 (or equivalent) preferred, or willingness to obtain upon hire
- 1–4 years of experience in client service, operations, or financial services support
- Strong attention to detail and ability to manage multiple priorities in a deadline-driven environment
- Excellent interpersonal and communication skills with a client-first mindset
- Proactive, solutions-oriented approach with the ability to work independently and collaboratively
- High level of professionalism and discretion in handling confidential client information
- Interest in building a long-term career in wealth management and client operations

Work Authorization

Candidates must be authorized to work in the United States on a full-time, permanent basis. We are unable to sponsor employment visas or support CPT/OPT arrangements for this role.

Compensation

Starting base salary range: **$65,000 - $75,000 per year**, depending on experience. Additional opportunities available, along with competitive benefits.