



GENOVESE BURFORD & BROTHERS

BUILDING TRUST. BUILDING WEALTH.

Position: Client Service Associate
Dept.: Wealth Management
Location: Sacramento, CA office
Status: Non-Exempt, Full-time

Founded in 1987, Genovese Burford & Brothers (GBB) is a leading independent wealth management firm based in Sacramento, CA. We offer financial planning and investment management services to individuals, families, and institutions, and retirement plan services to businesses.

GBB is growing, and we are seeking a Client Service Associate (CSA) to join our financial advisory team. The CSA is expected to work closely with Advisors, clients and custodians in delivering services. CSAs who excel in their roles create trust and connection with clients, and also anticipate Advisor needs to deliver work that allows the Advisor to focus on providing advice to clients. The CSA must fit within our culture of integrity, teamwork, and putting clients' interests first.

Primary responsibilities may include the following, among others:

- Provide client and advisor support in administering fee and commission accounts
- Set up new client accounts
- Compile and complete custodian, broker/dealer, and firm paperwork
- Track and complete deliverables as requested by clients
- Execute account tasks such as asset transfers, distributions, preparation of reports, client registration changes, address changes and cost basis updates
- Maintain and update client data in CRM and document management software
- Calendaring – assisting Advisors in managing their calendars and scheduling meetings
- Client outreach calls – touch base with clients periodically to assess their needs
- Assist in developing efficient processes to address changing compliance regulations
- Assist with quarterly reporting
- Provide back up support for other CSA teammates
- Attend client meetings as needed, present and discuss topics relevant to your function

Minimum requirements for consideration for the Client Service Associate role are:

- Resume and cover letter
- Clean criminal and regulatory record
- Willingness and ability to pass an initial drug test, and to submit to ongoing random drug testing, per company policy



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Strong candidates will offer the following:

- Bachelor's degree from an accredited college or university
- 2-3 years of work experience relevant to financial planning or wealth management
- Business or economics background with some degree of financial fluency
- Excellent problem-solving skills and the ability to work independently
- High level of organization and attention to detail
- Ability to prioritize tasks and to manage multiple reporting relationships well
- Strong communication skills
- Service orientation
- Team player, collaborative, able to work with others
- Excel and CRM software knowledge a plus

GBB offers competitive compensation and benefits, commensurate with experience. Genovese Burford & Brothers is an equal opportunity employer. For more information, visit us at <http://gbbwealth.com/careers>.