

THE SMITH GROUP



EMERALD ADVISORS
LLC

Client Administrator and Accounts Manager

Emerald Advisors, LLC is a fast-paced, detail-oriented, growth mindset fiduciary located in Bellevue, WA. We are looking for a Client Administrator and Accounts Manager to manage contact with clients for various stages of the client/firm relationship including but not limited to onboarding new clients, maintaining account information, managing client paperwork, opening accounts, transferring/funding client accounts, overall providing a high touch experience for our clientele. This person's role will help clients better understand the full potential of our expertise and services while acting on behalf of the client bringing them exceptional customer service. The motivated applicant will work closely with other departments in the company and must be a team player.

Role Responsibilities

- Provide regular updates to clients on the progress of paperwork, accounts holdings, transfers of funds, and communicate with client as necessary
- Provide tax information on time (1099's, K1's, etc.)
- Develop open and effective channels of communication with each client that bridges interactions of clients to all relevant team members and also can maintain open lines of communication with fellow team members
- Coordinate consistent maintenance of client accounts, determine what departments need to be involved, and utilize resources conscientiously for customer and company benefit
- Encourage revenue growth by inspiring clients to refer friends and by presenting the company's additional services that may apply to clients
- Become the reliable point of contact for each customer that is required to establish a strong, trustworthy business relationship

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Necessary Skills and Educational Standard

- Bachelor's Degree in Business or a related field required
- 3+ years' experience in a similar or related role
- Comfortable using Microsoft Office including Excel, Powerpoint, and Word
- Client Relationship Management experience helpful
- Knowledge/experience with Fidelity/Schwab centers helpful
- Proven ability to utilize the resources provided to maintain and build credible relationships with clients through face to face and virtual encounters
- Must be highly attentive to details and demonstrate an ability to work within strict deadlines
- Must possess strong communication and team skills

Full-time, salaried position with bonus possibilities. Remote working options available for the right candidate. The right candidate is a team player, can see the big picture while managing the day to day, small details for the client's individual needs. If you are a motivated recent Business/Finance graduate, we can provide excellent experience in the industry.

Please send a full resume, two references, and a cover letter to info@emerald-tsg.com.