QUORUM PRIVATE WEALTH
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JOB POSTING: CLIENT SERVICE ASSOCIATE

About Quorum Private Wealth

Quorum Private Wealth is a wealth management and financial planning firm based in Danville, CA offering financial services, asset management and customized advisory services to high-net-worth individuals, families, institutions, and corporations. The firm oversees approx. $1 billion of client assets.

Quorum launched in 2021 following the founders' long tenure at Merrill Lynch. We transitioned to independence by partnering with Sanctuary Wealth, to help provide an enhanced platform, best-in-class client solutions and support in running our business. Our firm is focused on providing proactive client experience, best-in-class investment strategies and financial planning and education. We look to "manufacture time" for our clients through simplification, optimization and organization, so they can get back to doing the things they love. Quorum has been recognized by Forbes | SHOOK as a Top 250 RIA, in addition to receiving several other industry accolades.

Position

We are seeking a motivated and detail-oriented Client Service Associate to join our team. The ideal candidate will possess an outgoing personality, excellent communication skills, and a passion for delivering exceptional client experiences. As a key member of our client service team, you will play a vital role in supporting our financial advisors and ensuring the highest level of service and satisfaction for our clients. Our robust training program alongside our industry-leading Wealth Associates, paired with your passion for personal development and growth, will provide you with the tools and knowledge to be successful in this role.

Responsibilities

- Act as the primary point of contact for clients, addressing inquiries, requests, and concerns in a timely and professional manner.
- Assist financial advisors in preparing client meetings and presentations, including gathering necessary materials and information.
- Coordinate account openings, transfers, and account maintenance processes, ensuring accuracy and compliance with regulatory requirements.
- Process client transactions, including trades, withdrawals, and deposits, accurately and efficiently.
- Collaborate with internal teams, including operations and compliance groups, to deliver comprehensive wealth management solutions.
- Maintain client records and documentation, ensuring confidentiality and compliance with data privacy regulations.
- Proactively identify opportunities to enhance client relationships and provide value-added services.

- Stay abreast of industry trends, market developments, and regulatory changes to better serve clients and support advisors.
- Participate in training and professional development opportunities to expand knowledge and skills in wealth management and financial services.

Qualifications

- Bachelor's degree
- Relevant industry and client service experience, preferred
- Interest in a career in financial services
- Excellent communication skills, both verbal and written, with the ability to articulate complex concepts clearly and concisely.
- Detail-oriented with strong organizational and time management skills.
- Ability to work effectively both independently and as part of a collaborative team.
- Client-focused mindset with a commitment to delivering exceptional service.
- Strong computer skills and proficiency in Microsoft Office, particularly Excel and Word
- Series 7 and 66 licenses preferred or willingness to obtain within a specified timeframe.

Job Type

Full -time work from office (Danville, CA)

Pay

Salary Range - $60k- $100k + bonus (compensation commensurate with experience, education, and skills)

Benefits

- Health, vision, dental, and life insurance benefits
- 401k with five percent (5%) employer match
- Unlimited PTO after 6 months – subject to management approval
- Company provided laptop

How to Apply

Email resume and cover letter to **info@quorumpw.com**