PITON WEALTH | Impact Statement

## CLIENT SERVICE ASSOCIATE- KALISPELL, MT OFFICE

## JOB OVERVIEW

The Client Service Associate provides administrative and financial support to all the members of the practice. This role is seen as the launchpad for development into a Wealth Planner I, Wealth Planner II, or Wealth Advisor role. In a field with so much technical complexity, advancing in this manner creates a tremendous foundation for future growth and ensures we are collectively serving our clients with the utmost professionalism.

## RESPONSIBILITIES

- Basic office management responsibilities to keep office running smoothly and efficiently
- Responsible for budget, ordering and stocking office supplies
- Supports Piton team members with administrative tasks
- Delegates advanced client service requests to the advisors and wealth planners
- Updates client financial statements and files
- Executes all basic appointment preparation for client meetings
- Executed general client service processes and requests
- Marketing and social media lead in coordination with Montana Event Planning Coordinator
- Executes assigned workflows in partnership and coordination with broad Piton service team

## REQUIREMENTS

- Undergraduate degree in business or related field
- Proficient in Word, Excel, Outlook and PowerPoint and good with technology
- Paraplanner (FPQP) designation within 90 days
- Open to other professional designations as career progresses (Certified Financial Planner and others)
- Deep roots and extensive relationships in Montana and preferably, the Flathead Valley
- High energy and tremendous follow up, highly organized and self-motivated