



Client Service Associate (CSA) – Join Our Team

Who We Are

At Retirement Wealth and Tax Advisors, we believe planning for your future should be **empowering—not overwhelming**. We are a well-established boutique firm in Pleasant Hill, CA, dedicated to guiding individuals through every stage of their retirement journey. Our goal is to be more than just advisors—we are partners who strive to bring **clarity, confidence, and peace of mind** to every client relationship. With advanced planning strategies and a deeply personal approach, we help clients build a meaningful path forward.

Why This Role Matters

As a **Client Service Associate (CSA)**, you'll be the heartbeat of our firm—ensuring seamless operations and delivering the outstanding service our clients expect. You'll work closely with our advisors, manage critical administrative functions, and directly impact the client experience every day. This is a role for someone who thrives in a dynamic environment, values precision, and takes pride in supporting both clients and colleagues.

Key Responsibilities

- **Serve as the primary point of contact** for clients, visitors, and team members—handling inquiries with professionalism and warmth.
- **Manage all incoming communications**—phone, email, and voicemail—ensuring prompt, accurate responses and meticulous CRM documentation for follow-up.
- **Coordinate and schedule client meetings**, maintaining organized calendars and proactively confirming appointments.
- **Prepare for client meetings** by updating information, conducting research, reviewing notes, and tracking action items to ensure nothing falls through the cracks.
- **Maintain and organize client documents**—both physical and digital—with strict attention to confidentiality and accuracy.
- **Support the client onboarding process** by reviewing documentation, collecting necessary signatures, and ensuring a smooth transition for new clients.
- **Process client service requests** efficiently—including account updates, transactions, and tax-related inquiries.
- **Keep the team informed and aligned** on upcoming commitments and priorities.

- **Troubleshoot office equipment** and coordinate with vendors for timely resolution of technical issues.
- **Follow structured checklists and workflows**—because consistent processes lead to consistent results.
- **Handle challenging situations** with tact, professionalism, and a positive attitude—escalating issues when appropriate.
- **Champion our collaborative culture**, driving partnership and teamwork across the firm.

Who You Are

- Minimum of **two years' experience in financial services** (experience preferred, but we're open to the right candidate).
- **Exceptional organizational skills**—able to juggle multiple priorities without dropping the ball.
- **Proactive problem-solver** with sound judgment and the ability to make smart decisions under pressure.
- **Strong communicator**—both written and verbal—with the ability to build rapport with clients, colleagues, and business partners.
- **Tech-savvy**, with proficiency in Redtail, Microsoft Office Suite (Word, Excel, PowerPoint, OneNote, SharePoint), and comfort learning new systems.
- **Licensed with a FINRA Series 7** (preferred, but not required).
- **Able to pass criminal and credit background checks.**

Why Work With Us?

- **Make a real difference** in clients' lives by helping them navigate complex financial decisions.
- **Be part of a supportive, collaborative team** that values your growth and input.
- **Enjoy a structured, checklist-driven environment** that empowers you to excel and minimizes operational risk.
- **Grow your career** with a firm committed to professional development and work-life balance.

How to Apply

Ready to take the next step? Submit your resume and a cover letter explaining why you're the right fit for our team to dkramer@retirement-approaches.com. For more about who we are and what we do, visit our website and check out the "Join Us" tab. Website: www.retirement-approaches.com

Retirement Wealth and Tax Advisors is an equal opportunity employer. This job description is not intended to be all-inclusive. Employee may be required to perform other related duties as assigned to meet the ongoing needs of the organization.