



CLIENT SERVICE ADMINISTRATOR (CSA)

Affinia Financial Group, a 10-person Registered Investment Advisory firm (RIA), is seeking to hire a detail-oriented professional as the Client Service Administrator to join their team. This is an entry-level opportunity to work in our Burlington, MA office with a highly experienced financial planning and wealth management team in a fast-growing, dynamic, niche-based practice. We are pioneers in special needs financial planning.

The Client Service Administrator (CSA) will work with the Client Service Team to maintain the integrity and consistency of the firm's client service offering and operations to enhance and support the firm's relationships.

This support role will be responsible for paperwork, preparing client reports, manage tasks and calendars within Salesforce, responding to client requests, and troubleshooting problems.

The ideal candidate must be dedicated to providing exceptional client service and satisfaction. The CSA must have strong organizational and communication skills, be detail oriented, and be comfortable with managing and adapting to changing schedules and priorities while having the ability to handle urgent client requests and meeting the day-to-day task needs. Strong problem-solving and multi-tasking skills are a must. This candidate must have the ability to be a team player and work with various personalities in an often fast-paced environment.

Skills:

- Proficiency in the use of the following technologies:
 - Microsoft Office Suite, Outlook
 - Salesforce knowledge and proficiency a plus
 - Strong Excel skills a plus
 - Knowledge of financial reporting tools including Black Diamond, Morningstar and/or Fidelity platforms a plus
 - A passion for special needs planning another plus

Education:

- Bachelor's degree required
- 1+ years working in the financial planning, wealth management, RIA and/or financial services industry
- Hiring is subject to favorable results from a background check

Compensation:

- Salary and bonus based on experience. Range is from \$45,000-\$50,000 annually.
- Generous benefits including group health, short-term, long-term, and life insurance benefits and 401(k) retirement plan with employee match.

If you have an interest in this position, please submit your resume and cover letter to info@affiniafg.com.