



Client Service Manager

Fairport/Luma Wealth is looking for a Client Service Manager with a background in the Financial Services industry. The Client Service Manager will be responsible for providing an exceptional client experience as a member of the Advice Staff.

Responsibilities and Duties

- First point of client contact for client servicing requests
- Preparation and tracking of client custodial account paperwork from start to finish for new and existing relationships
- Significant interaction and interface with custodians
- Client and COI communications
- Management of client contributions and distributions
- Client meeting scheduling
- Meeting material preparation for clients and prospects
- Client tax payments
- Bill pay as needed
- Setup of client personal financial management website (PFM) through financial planning system

Qualifications and Skills

- 5+ of experience working with high net worth clients
- Working knowledge of Microsoft Excel
- Working knowledge of Quicken preferred, but not required.
- Detail oriented
- Strong organizational skills
- Strong work ethic
- Ability to handle multiple priorities with minimal supervision
- Enthusiastic learner
- Strong written and verbal communication skills
- Self-starter
- Experience with a Client Relationship Management (CRM) system a plus

Submit your resume to Aaron Nuti at aaron.nuti@fairportasset.com. No phone calls, please.

With roots dating back to 1963, Fairport is a registered investment advisor that INSPIRES FAMILIES by providing comprehensive wealth management solutions. Our team of credentialed professionals have extensive experience in guiding corporate executives, business owners and women of wealth. We help our clients with life's transitions including succession, retirement and liquidity planning, marital/partnership changes or loss of a spouse. Luma Wealth Advisors is a division of Fairport that provides women with personalized wealth planning, experienced investment management, and a supportive, enriching community where they can learn, connect, and celebrate with other women. More information at www.FairportAsset.com and www.LumaWealth.com.