Position Description: Private Client Service Specialist

Purpose	At Greenspring, our Core Purpose is to "improve lives by helping people make better decisions for themselves and those who depend on them" and we are looking for talented people who share this passion. Working at Greenspring gives you the ability to: • Own Your Future with defined career paths and tools, coaching and support to help you create the future you want • Be Part of a Great Culture where you'll be a part of a team of people who are committee to each other's success • Make a Lasting Impact on the lives of our clients and through the camaraderie of working for a common goal with your peers The Private Client Service Specialist will work with our Private Client Advisory team to coordinate all client service activities with a focus on delivering the ultimate client experience. This position is critical to building client advocacy and ensuring continued profitability of the firm through organic growth and referral opportunities by setting and maintaining high service standards for the firm, creating positive client experiences, and fostering a culture of teamwork and collaboration. This individual spends almost all of their time in client-servicing activities so that the advisors can focus efforts on growing the firm.
Responsibilities	• Coordinate and execute service activities, such as Onboarding new clients, resolving Service Requests, gathering and compiling data for client meetings, maintaining client files/dashboards and handling day-to-day client requests • Process tasks and resolve issues in a timely and accurate manner • Assist with client reporting and billing • Manage relationships with clients and internal and external resource providers • Partner with Senior Financial Advisors and Service Advisors to fulfill client requests and deal with service-related issues
Specific Measures of Success	• Demonstrates efficiency in working with multiple advisors and multiple clients by leveraging firm resources and tools • Understands the differences between each custodian and their processes and workflows (what forms are needed to accomplish different tasks, alternate options, and custodians processing requirements) • Quickly responds to client requests and resolves open tasks according to practice group standards • High degree of pride in the accuracy and quality of your work product • Proactively eliminates obstacles before they become issues

Job Requirements

Industry/Business Experience	Two years in financial services and/or administrative operations role preferred
Education	College degree or comparable experience
Skills and Knowledge	• Always focused on client needs and customer service • Detail-oriented and methodical • Follows up and follows through • Exceptional organizational skills with a proven ability to multi-task and manage multiple projects • A team player with good interpersonal skills and the ability to work collaboratively across departments • Excellent oral and written communication skills • Demonstrated problem-solving abilities • Ability to excel in a fast-paced, changing environment • A self-starter who is assertive, proactive, independent, flexible and accommodating • Expert in most Microsoft Office applications. Comfortable learning and navigating new technology and software applications. Experience with Salesforce and/or Tamarac a major plus.
Requirements / Additional Information	• The Client Service Specialist will be required to obtain their Series 65 license and/or the Financial Paraplanner Qualified Professional™ (FPQP™) designation • This individual will report to the Director of People Operations • The first 90 days of employment will include an extensive onboarding/training program. • After the first 90 days and with manager's approval, the Candidate may be eligible to work from home for a specified number of days per month.

Firm Profile

Our founding partners came up with the idea for Greenspring in 2002 while working for two of the world's largest brokerage firms. Thrust into a fast-paced and competitive sales culture with little more than a phone book, a desk, and a phone, it quickly became clear that "clients" took a backseat to "commissions". But we had a different vision of what we wanted our careers to look like and how we wanted to work with our clients. So, in 2004 we started out on our own with a handful of clients who believed in us and a different vision for the future where we existed to serve them and not the other way around. From the beginning, we left behind the lack of transparency and conflicts of interest that made it so difficult to serve our clients in the best way possible and fully embraced a fiduciary duty to clients, placing their interests before our own. We always believed that if we worked hard, aligned our interests with our clients and did the right thing for them, kept our promises, gave back to the community, and hired great people the rest would take care of itself. Over 15 years later we have been incredibly fortunate to work with great clients, build an awesome team and give back hundreds of thousands of dollars to the communities in which we live and work through our Greenspring Charitable Fund and Greenspring Grant Program. At Greenspring, we have much to be grateful for and while a lot has changed since the beginning, one thing has remained constant – our clients come first.

Greenspring is consistently ranked as one of the country's leading independent advisory firms. We look to hire talented individuals with leadership potential, integrity, a sharp analytical mind, creativity, and the ability to work interdependently with others. We offer a competitive compensation package including:

- Medical, Dental and Vision Insurance Offered
- Health Savings Accounts
- 401(k) Plan with employer match and discretionary profit-sharing contributions
- Paid Leave & Vacation Allowance
- Employer-paid Disability Insurance; Group Life and AD&D
- Annual professional development stipend for continuing education, courses, conference attendance, etc.

- Stand-up desks, dual computer monitors, monthly social events, and volunteer hours

Please submit your resume to careers@greenspringadvisors.com

Greenspring is an Equal Opportunity Employer. It is the policy of the Company to provide equal opportunity for all employees and applicants for employment without regard to race, color, creed, religion, gender, sexual orientation, national origin, age, marital status, mental or physical disability, pregnancy, military or veteran status, or any other basis prohibited by state or federal law. This policy also prohibits employees from harassing any other employees for any reason including, but not limited to, race, religion, sex, national origin, age, or disabled status.