GREENSPRING ADVISORS

Corporate Retirement | Wealth Management

Position Description: Client Service Specialist

Location	Lancaster, Pennsylvania – **This position is ON SITE and IS NOT remote**

Purpose	At Greenspring, our Core Purpose is to "help every person live their ideal life" 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 • Thrive in a great culture where you'll be a part of a team of people who are committed to each other's success • Make a lasting impact on the lives of our clients through the camaraderie of working for a common goal with your peers The 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 creating positive client experiences and fostering a culture of teamwork and collaboration. This individual spends almost all their time on 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, initiating and resolving Service Requests, maintaining client files/dashboards, and handling day-to-day client requests. • Process tasks and resolve issues in a timely and accurate manner. • Manage relationships with clients and internal and external resource providers. • Partner with Financial Advisors to fulfill client requests and service-related issues.
Specific Measures of Success	• Quickly responds to client requests and resolves open tasks according to practice group standards. • Proactively eliminates obstacles before they become issues. • Demonstrates efficiency in working with multiple advisors and multiple clients by leveraging firm resources and tools. • High degree of pride in the accuracy and quality of your work product. • Understands the differences between custodians and their processes and workflows (what forms are needed to accomplish different tasks, alternate options, and processing requirements).

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 • Adaptable and effective, delivering consistent results • A self-starter who is assertive, proactive, independent, and accommodating • Expert in most Microsoft Office applications. Comfortable learning and navigating new technology and software applications. Experience with Salesforce and/or Tamarac is a major plus.
Requirements/Additional Information	• The first 90 days of employment will include an extensive, hands-on in-person onboarding/training program. • After the first 90 days and with your manager's approval, the Candidate may be eligible to work from home for a specified number of days per month. • Start base salary range: $50,000-$65,000, with the opportunity to earn an additional discretionary annual bonus of up to 10% of earnings.
How to apply	Send your resume to careers@greenspringadvisors.com

Firm Profile

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:

- Health, Dental and Vision Insurance Offered
- Health Savings Accounts and Flexible Spending Accounts
- 401(k) Plan with employer match and discretionary profit-sharing contributions
- GREEN Units (equity ownership in the firm after two years)
- Paid Time Off + Volunteer PTO
- Paid Short-Term and Long-Term Disability Insurance
- Paid Group Life Insurance
- Free financial planning and investment advice
- Annual professional development stipend for continuing education, courses, conference attendance, etc.
- Cellphone reimbursements
- Matching Gifts Program
- Stand-up desks, dual computer monitors, team engagement events, and volunteer Days of Service

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.