

Client Account Specialist

Fragasso Financial Advisors, Inc. is a primarily fee-based financial planning and investment management firm headquartered in Pittsburgh, PA. We are passionate about creating an exceptional client experience, and we have been helping clients work towards their financial goals since 1972.

We are currently seeking an experienced, detail-oriented individual for our Client Account Specialist position located at our downtown Pittsburgh office.

This position is responsible for supporting our Financial Advisors and providing excellent service to our clients. As a Client Account Specialist (CAS) you will:

- Provide timely administrative support to clients and Financial Advisors, including handling daily transactions while adhering to compliance and regulatory policies.
- Resolve client questions and/or concerns regarding existing or prospective accounts
- Provide and advise on the proper paperwork required, review all documentation for completeness and accuracy, facilitate asset transfers, contacting necessary persons to obtain information to complete final transfers.
- Maintain client confidence and protect operations by keeping information confidential
- Maintain accurate notes in CRM, documenting client contact and status of actions to ensure updated files and records
- Interact with back office to ensure compliance guidelines, research of issues and obtain updates
- Follow up and resolve notifications
- Communicates effectively with team members and assumes responsibility for outcomes
- Promotes and participates in firm-sponsored events
- Complete other duties as assigned by Manager

We are seeking a detail-oriented, self-motivated individual who enjoys interacting with clients and has proven administrative experience. To be considered for this position, you should possess the following qualifications:

- Two years of experience in a clerical position, preferably with a financial investment firm
- Bachelor's degree desired
- Excellent customer service and communication skills
- Experience utilizing customer relationship management (CRM) systems. Salesforce a plus
- Strong PC skills, including Microsoft Office

Fragasso offers an excellent benefit package, including medical, dental, vision, 401k, profit sharing, company-paid life insurance, and an Employee Stock Ownership Plan (ESOP).

Fragasso Financial Advisors also received "Best Places to Work" awards last year by the *Pittsburgh Business Times* and *Investment News*.

Qualified candidates may send their cover letter and resume to gpond@fragassoadvisors.com