

Client Services/Operations Associate - Wealth Manager in Westchester

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Our client, a boutique wealth manager in Westchester, is looking to add a Client Services/Operations Associate to their growing team. The role will be a mix of new client onboarding, client correspondence and inquiries, wire transfers, audits, and ad hoc projects. The ideal candidate will have 3-10 years experience in a client services/operations function, and excellent attention to detail/communication skills. Requirements: BA/BS degreeWillingness to pursue and obtain the following professional designations FINRA Series 7/66Strong analytical skills with high attention to detail and accuracyExcellent Excel, Outlook, Word, & Salesforce skills

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