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Senior Client Service Associate

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Company: TalentWealth

Location: Chelmsford

Category: other-general

At TalentWealth Recruiting we assist independent Wealth Management firms across the country in hiring top professionals to join their practices. Our client, a financial advisor practice based in Chelmsford, MA with another office in Bedford, NH, is seeking an exceptionally sharp, motivated, and detail-oriented Senior Client Service Associate to join their team to provide proactive in-office support to financial advisors and assist with efficient, quality client service in a boutique office environment. This client is open to hiring individuals with or without the Series 7 and Series 66 licenses as long as they have experience supporting a financial advisor directly in the past. This position would be 100% in-office. Full time position Monday-Friday. They offer competitive compensation and benefits. Requirements: 2+ years of experience supporting a financial advisor or financial advisor team with client service and administrative support. Licenses are not required now or in the future but they are also open to hiring licensed candidates as well.

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