



# Example of Client Service Associate Job Description

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Our growing company is looking to fill the role of client service associate. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for client service associate

- Monitor plan parameters and administrative operations to ensure compliance with plan document provisions, applicable governmental rules and regulations
- Work with clients to "clean" census data
- Monitor all participant and plan-specific contribution limits and plan-level deductibility limits
- Provide timely, accurate and concise service to participant inquiries and requests
- Proactively engage participants, anticipate their needs and offer assistance and solutions
- Establish appropriate service expectations by sharing relevant processes and time frames related to specific inquiries and requests
- Respond to all participant phone inquiries and requests in a timely and accurate manner
- Initiate and complete account transactions as requested made by participants
- Document all participant calls and transactions timely and thoroughly
- Proactively communicate and coordinate efforts with Plan Services Group (PSG) units to address all participant service issues and provide necessary research, problem solving and resolution

## Qualifications for client service associate

- Must be computer literate and proficient with Windows, Word and Excel
- 1 -3 years' experience supporting software applications, and providing technical client service and support
- 1-3 years' experience in a financial services atmosphere preferred, specifically the registered advisory, brokerage or financial services industry
- High School Diploma or equivalent and one (1) or more year's securities industry or related work experience preferred
- Internship experience a plus, preferably in financial service/client service, but will consider college graduates with interest in a career in Financial Planning