Now Hiring!

Client Service Administrator

2508 E 21st Street
Tulsa, OK 74114
www.legacyadvisor.net

The Legacy Financial Group is seeking a Client Service Administrator to add to our growing team! We are a premier wealth management firm based in Tulsa, OK and serving clients internationally. Far beyond merely managing their assets, we enable clients to focus on what matters most in their lives: their time, their families, their businesses, and their life goals.

The Client Service Administrator (CSA) plays a critical part in this high calling by putting our clients' financial plans into action. The CSA collaborates daily with the team and our industry partners to ensure progress and communication with clients.

Talents and Skills

This role is perfectly suited to a person that loves to cross items off a to-do list, has fantastic attention to detail, and enjoys the sense of accomplishment that comes with finding solutions to problems. The ideal candidate is enthusiastic about serving clients well, has impeccable written and verbal communication skills, and has a high comfort level with learning new technology. A bachelor's degree is required, as well as proficiency in Microsoft Office and the ability to set priorities for tasks, balancing urgency with importance.

Responsibilities

- Facilitate new client onboarding and service to existing clients through preparing custodian documents, managing money movements and transfers, and spearheading the completion of team workflows.
- Communicate with clients to provide updates of their account standing and next steps.
- Troubleshoot issues that arise and bring problems to resolution.
- Maintain up-to-date organized client files according to firm protocol and compliance requirements.
- Scheduling client meetings and greeting clients upon arrival.
- Facilitate firm relationships with clients by preparing life event recognition cards.
- Maintain office and kitchen supplies.
- Other responsibilities as requested.

Legacy Offers

- Competitive salary and performance-based bonuses
- Company retirement matching
- Paid time off and flex schedule
- Continued Education opportunities and funding
- Company health and dental plan

To Apply

Candidates should send a resume and cover letter to elissa@legacyadvisor.net.

Thank you for considering
The Legacy Financial Group!

Legacy's Core Values

More than any other qualification, alignment of values will determine our best fit!

- **Service**
  We are called to passionately serve our clients and each other with our full capabilities.
- **Integrity**
  We make the honorable choice, every time.
- **Excellence**
  We aim to raise the industry standard through our efforts.
- **Execution**
  We set the vision and carry it to completion for every client.
- **Collaboration**
  We do meaningful, fulfilling work together! We are better as a team than we are alone, and we enjoy the time spent with each other.