



**BIRCHWOOD**  
**FINANCIAL PARTNERS**

*Knowledge. Insight. Wisdom.*

## **Client Service Specialist**

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Location:	Edina, MN
Employee Type:	Full-Time
Education:	College degree is preferred
Experience:	1+ years of financial industry experience is preferred or two years of administration experience.
Salary Range:	\$40,000 - \$50,000

### **About Us:**

Birchwood Financial Partners excels at helping clients gain confidence in their financial future by providing simplicity and solutions to their clients' complex financial situations. As an independent Registered Investment Advisor (RIA) firm and fiduciary, we provide ongoing wealth management and investment management services to individuals and families in the twin cities and throughout the country. Established in 1990 we focus on client relationship, collaboration, education and integrity. We were awarded the title of one of the top 10 Financial Advisory firms in Minneapolis, St. Paul and Edina for three years running. One of our specialties is helping our clients invest with their values by offering Sustainable, Responsible Impact (SRI) investing.

### **Description:**

We are seeking a dynamic, highly motivated and proactive individual to join our twelve person team as a Client Service Specialist (CSS). Working with our Financial Advisors and Investment Management team, the CSS takes care of the client. The CSS role includes meeting preparation, trading, utilizing a client relationship management tool, providing needed forms and following through to ensure processes are completed properly. The job will include tasks such as account opening, money transfers, transactions and general business processing and administrative duties. The CSS also communicates directly with our clients and other related organizations.

### **The Successful Candidate**

The successful candidate is highly responsible and has extraordinary verbal and written communication skills. S/he uses excellent social skills to communicate effectively with clients and vendors to get tasks accomplished. The successful candidate is focused, has outstanding time management and is good at creating, following and completing processes. S/he is able to manage multiple priorities and meet daily deadlines. S/he has high integrity and is trustworthy and dependable.

## **Requirements and Qualifications**

- Excellent verbal and written communication skills.
- Superb social skills.
- Critical thinking and problem solving.
- Friendly and empathetic.
- Detail oriented.
- Learns quickly.
- Self starter and ability to work within a team with minimal supervision.
- Excellent computer skills including Microsoft excel, word and outlook and ability to learn new software easily.
- Keeps information confidential.
- Professional.

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