PRAIRIE CAPITAL

Job Description: Client Service Associate

Company Name: Prairie Capital Management Group, LLC

Location: Kansas City, MO

Work Arrangement: Hybrid

Job Summary

We are seeking a detail-oriented and client-focused Customer Service Representative to join our financial advisory team. This role is at the forefront of client interaction, ensuring exceptional service and operational support for our advisors and clients. The ideal candidate will have strong communication skills, a passion for helping clients achieve their financial goals, and the ability to manage multiple priorities in a fast-paced environment. This position offers flexibility with remote work options, allowing you to work from home while maintaining strong virtual client engagement.

Key Responsibilities

- Serve as the primary point of contact for client inquiries via phone, email, video conferencing, and in-person meetings.
- Assist clients with account-related questions, documentation, and service requests.
- Schedule and prepare for client meetings, including organizing materials and reports.
- Coordinate account openings, transfers, and money movements with custodians and internal teams.
- Process transactions accurately and ensure compliance with firm policies and regulatory requirements.
- Maintain and update client records in CRM systems.
- Collaborate with financial advisors and planners to execute client service tasks promptly.
- Monitor and resolve time-sensitive requests such as trade instructions and custodian alerts.
- Prepare and follow up on paperwork for investment transfers, rollovers, and insurance applications.
- Proactively anticipate client needs and provide solutions to enhance satisfaction.
- Ensure timely resolution of client issues and escalate complex matters when necessary.
- Uphold confidentiality and professionalism in all client interactions.

Qualifications

Education: Bachelor's degree in Finance, Business, or related field preferred.

Experience: 2+ years in financial services or client service roles; experience in wealth management or advisory firms is a plus.

Skills:

- Strong verbal and written communication skills.

- Proficiency in Microsoft Office Suite and CRM systems.

- Ability to prioritize tasks and work under pressure.

- Knowledge of financial products and services (Series 65 or insurance license is a plus).

- Comfortable with remote collaboration tools (Zoom, Teams, etc.).

Core Competencies

- Client-centric mindset with excellent interpersonal skills.
- High attention to detail and organizational ability.
- Problem-solving and critical thinking.
- Ability to work collaboratively in a team environment, both in-office and remotely.

Benefits

- Competitive salary and performance-based bonuses.
- Health, dental, and vision insurance.
- 401(k) with company match.
- Paid time off and professional development opportunities.
- Flexible work arrangements, including hybrid options.