PRAIRIE CAPITAL

Job Description: Client Service Associate

Company Name: Prairie Capital Management Group, LLC

Location: Kansas City, MO

Work Arrangement: Hybrid

Job Summary

At Prairie Capital, we are committed to helping clients navigate the complexities of significant financial resources while achieving their long-term goals. Our culture is rooted in respect, collaboration, and accountability, with a strong emphasis on curiosity and continuous improvement. Team members are encouraged to take initiative, grow professionally, and contribute meaningfully to both client outcomes and firm success.

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. We are seeking individuals who are self-motivated, detail oriented, intellectually curious, and highly professional. Candidates should demonstrate a genuine willingness to understand each client's unique background, financial objectives, and goals. In addition, we are seeking candidates that understand the importance of responding to client queries in a timely manner and can manage priorities in a fast-paced environment. Exceptional organizational skills and the proficiency to transition seamlessly between tasks are a must. 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.
- Proactively anticipate client needs and provide solutions to enhance satisfaction.
- Monitor and resolve time-sensitive requests such as trade instructions and custodian alerts.
- Process transactions accurately and ensure compliance with firm policies and regulatory requirements.

- Coordinate account openings, transfers, and money movements with custodians and internal teams.
- Prepare for client meetings, including organizing materials and reports.
- Collaborate with relationship managers to execute client service tasks promptly.
- Prepare and follow up on paperwork for investment transfers, rollovers, and insurance applications.
- Ensure timely resolution of client issues and escalate complex matters when necessary.
- Maintain and update client records in CRM systems.
- Uphold confidentiality and professionalism in all client interactions.
- Obtain Series 65 license within the first 12 months of employment.

Qualifications

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

Experience: 2+ years in financial services or client service roles preferred; 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.
- Health Savings Account (with employer contributions) and Flexible Spending Accounts
- 401(k) with company match.
- Paid time off, paid holidays and professional development opportunities.
- Paid parental leave and family support benefits, including adoption assistance
- Short-term and long-term disability and life insurance
- Flexible work arrangements, including hybrid options.