CHRISTY
CAPITAL MANAGEMENT, INC.

| Overview | |
|---|---|
| Job Title: | **Client Service Team Assistant** |
| FLSA Status: | Non-exempt |
| Reports To (Title): | Assistant Lead Manager |
| General Summary: | CCM is seeking a detail-oriented Client Service Team Assistant who is motivated by service and committed to supporting others with care and excellence. We are looking for someone who desires to grow with our firm long-term as we continue to develop our Client Service Team.<br>Our mission is to bring peace, clarity, and light into our clients' lives—whether through direct client service or behind-the-scenes support. In this role, the Client Service Team Assistant will support our Financial Planners and play an important part in helping our team deliver compassionate, high-quality client experience.<br>This position offers the opportunity to work in a fast-paced environment with a caring, supportive, and collaborative team. Prior financial industry experience is not required as CCM provides training and ongoing opportunities to learn and grow within the company.<br>The Client Service Team Assistant provides exceptional administrative and operational support to Financial Planners within our financial planning firm. The ideal candidate is detail-oriented, service-minded, and able to maintain efficiency while upholding industry compliance standards.<br>This is a full time, in office position. |

| Principle Duties and Responsibilities | |
|---|---|
| Role & Responsibilities | • Deliver excellent client communication and service while providing proactive support to Financial Planners<br>• Collaborate with custodians to ensure accurate and timely processing of account transfers, funding requests, and other transactions<br>• Stay current on custodian policies, procedures, and platform updates to support smooth operations<br>• Manage and maintain the firm's Salesforce platform, ensuring accurate account data, efficient workflows, and adherence to best practices<br>• Provide timely assistance to Financial Planners in addressing client needs, custodian communications, and Salesforce-related challenges<br>• Organize and prioritize daily workload to effectively manage multiple time-sensitive tasks<br>• Manage Financial Planners' calendars, including scheduling and coordination of appointments<br>• Assist with preparation for client meetings and attend meetings when needed to provide support |

The statements above are not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the job. Duties, responsibilities, and activities may change at any time with or without notice.

| | |
|---|---|
| | • Maintain accurate, current, and well-organized client and account records in compliance with firm standards<br>• Assist with client onboarding and account maintenance processes |

| Job Specifications | |
|---|---|
| Experience Requirements: | • Microsoft Office Suite with strong proficiency in Word, Excel, PowerPoint, and Outlook<br>• SalesForce experience preferred but not required<br>• Excellent and professional level verbal and written communication skills<br>• Ethical with the ability to discreetly handle confidential data. |
| Education Requirements: | • High School diploma or equivalent required |
| Core Competencies We Will Expect to Be Developed | • Expertise in Salesforce administration and best practices.<br>• Strong understanding of custodian operations and relationship management.<br>• Knowledge of financial planning principles and compliance standards. |
| Ideal Candidate DNA: | • Excellent customer service skills with commitment to professionalism and care<br>• Strong attention to detail and a high level of discretion in maintaining confidentiality<br>• Adaptable and responsive to changing and evolving job duties and expectations<br>• Well-developed organizational and project management skills<br>• Strong work ethic with a sense of urgency and accountability<br>• Ability to work independently while also thriving in a collaborative team environment<br>• Exceptional problem-solving, communication, and organizational skills<br>• Detail-oriented, motivated, and comfortable multitasking in a fast-paced environment<br>• Demonstrates strong character, integrity, and a positive professional reputation |

The statements above are not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the job. Duties, responsibilities, and activities may change at any time with or without notice.