Client Service Associate

The Lyon Group is looking for a Client Service Associate with experience in the financial services industry – a servant-leader and process-driven thinker who gets things done. Your job is to guide clients through the onboarding and new account process and to deliver amazing customer service. You take responsibility for all the little things that keep a fast-moving company running – and you do it with a smile. You thrive working independently but love being part of a team.

Here's what we're looking for:

- **Servant-Leader** who enjoys people, genuinely wants to help others and is excited to provide high level customer service
- **Process-Driven Thinker** who pays attention to detail, who finds ways to work smarter (not just harder) and who does not let things fall through the cracks.
- **Strong Communicator** who listens well, takes time to understand… and can clearly explain things (verbal and written) and can make our clients feel well taken care of

You take ownership over your areas of responsibility and help our team succeed by building systems, diligently tracking your projects, and playing your key role on our team. Most important, you have a service-driven attitude and define your success as helping other people thrive.

Here's your job:

- **Manage New Business.** When clients decide to implement a new account solution (investments, insurance, annuity), you'll walk them through the new account process. This will include populating new account electronic applications, ensuring completion and signatures and then tracking to completion (application processing, underwriting, account funding, delivery). You'll also ensure we have required advisor licensing.
- **Client Account Service.** Clients often have questions or needs with their existing accounts e.g., an account distribution or contribution, beneficiary update, or change of address. You'll be their primary point of contact for these service needs and will take responsibility for getting the job done – and even going the extra mile when you can.
- **General Client Service.** You'll assist with other key service-related responsibilities – including meeting preparation and sharing office and phone coverage duties with other team members.
- **Communicate Proactively.** Our clients' trust and confidence in us is paramount. Excellent communication is key to building and maintaining that trust relationship. In your role, you will be communicating directly with clients via email, phone calls, video calls and in person. It's your job to keep them informed and make them feel loved.

- **Be a Team Player.** You will participate in required meetings, training, and continuing education requirements.

At The Lyon Group, we help our clients align their wealth with their values through thoughtful planning. And our people are one of our most valuable assets. We're based on the east side of Cincinnati and immensely proud to be celebrating our 75th year in business. Our Client Service Associate role is ideal for someone who thrives in a smaller office setting, is proactive, detail-obsessed, and eager to contribute to a high-integrity financial services firm.

Qualifications

- Ability to manage multiple complex tasks simultaneously, with strong prioritization, project-management, and personal task management systems
- Fantastic communicator, writer, and explainer
- A genuine interest in caring for clients – excited to provide high level customer service
- Well organized and self-driven (will be expected to self-manage and meet deadlines)
- Quick learner and high attention to detail
- Making it right makes you happy -- you are always looking for ways to improve how we work and for better ways to do things
- Embrace a small company culture (and know what that means)
- Awesome attitude, good cheer, and great sense of humor
- Experience in the financial services industry a major plus
- Insurance license and/or FINRA Series 6, 7, 63, 65, 66 a plus
- Understanding of financial planning concepts and various products
- Proficiency with Microsoft Office Suite and experience using a CRM
- Bonus points for experience with Envestnet, Wealthscape, eMoney

Compensation & Benefits

This is a full-time W2 position. 40 hours per week. Starting salary is commensurate with experience. Benefits include

- Health, dental and vision insurance
- Retirement plan with company match and profit-sharing eligibility after 6 months.
- Paid-time off, including vacation days and paid holidays
- Flexible Work Option: one remote workday per week after initial training is complete
- Team happy hours, birthday lunches, and celebratory events throughout the year

How to get this job: We want to see a great cover letter, resume, and anything else that shows us how you think and work. Show us what you have done and how you can do it for us. Send your submissions to andig@thelyongroup.net