



## Wealth Management

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### **Client Service Associate**

#### **Position Description**

We seek a highly motivated and intellectually curious team member to join our growing client-centric wealth management firm. The ideal candidate aspires to pursue a rewarding career in the operational and client service functions of our firm.

Working under the direction of the firm's wealth advisors and senior client service associates, this position will support key aspects of our firm, including:

- **Client Service**
  - Assist advisors with establishing and maintaining client relationships by completing custodial forms for opening and transferring accounts
  - Facilitate client requests such as charitable gifts, cash transfers, and required minimum distributions
  - Prepare portfolio reports for client meetings
- **Operations**
  - Set up new clients and accounts in the firm's portfolio management system
  - Review daily transactions in client accounts for accuracy and further action
  - Process trades in client accounts
  - Generate quarterly performance reports for clients

#### **Required Skills and Education**

- Attainment of a bachelor's degree from an accredited institution
- Detail oriented
- Client service focused
- Excellent written and verbal communication skills
- Comfortable learning new technologies
- Maintain confidentiality of client information

#### **Hiring Requirements**

- Consent to background and credit check
- Proof of COVID-19 vaccination

## **Position Benefits**

### **Retirement Plan and Profit Sharing**

You are eligible to defer a portion of your salary, up to IRS limits, into the firm's 401(k) retirement plan. Kuhn Advisors will contribute 3% of your salary to the 401(k) plan provided you contribute at least 1 %. Depending on the firm's financial results, the firm may also contribute a portion of profits to each employee's retirement account.

### **Vacation**

New employees are eligible for 10 days of vacation annually. After two years of employment, vacation days increase to 15 days annually and after four years increase to 20 days annually.

In addition to vacation, the firm provides the following paid holidays:

- New Years Day
- Martin Luther King Day
- Presidents Day
- Good Friday
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Thanksgiving and the Friday following
- The week between Christmas & New Years

### **Paid Parental Leave**

After completing one year of employment, you are eligible for up to 12 weeks of paid leave following the birth or adoption of a child. For employees with less than one year of service, a pro-rated benefit equal to one week of paid leave for each week of service is available.

### **Healthcare Reimbursement Plan**

After 90 days of employment, you are eligible to participate in our healthcare reimbursement plan. Kuhn Advisors will reimburse eligible healthcare expenses up to \$5,850 annually. (\$487.50 per month)

### **Short-Term Disability Benefit**

Employees experiencing a short-term disability are eligible for up to 12 weeks of fully-paid leave and an additional 12 weeks at 67% pay.

## **Caregivers Leave**

10 days paid leave annually to fulfill duties as a primary caregiver after one year of service.

***Kuhn Advisors, Inc. is an Equal Opportunity Employer***