



Client Services Specialist (Full Time Position) – Northern Virginia

Madison Wealth Management is a rapidly growing independent, fee-only, wealth management firm with offices in Leesburg, Virginia, Bethesda, Maryland and Cincinnati, Ohio. Operating since 2000, Madison provides customized financial planning and wealth management services to private clients whose portfolios range from \$1 million to \$25 million. We are looking for motivated individuals who want to learn, grow and be part of an exciting, forward looking organization.

Position Summary:

In the role of Client Services Specialist you will be the firm's main point of contact for our *Leesburg, Virginia* office supporting and serving high net worth clients including responding to their questions and administrative needs while exercising a high degree of confidentiality and initiative.

Essential Functions:

- Open, maintain and service client accounts
- Maintain control of matters in progress and follow up to ensure actions are completed
- Operate as the firm's main point of contact with account custodians
- Establish, prepare, and maintain a variety of files and documents
- Draft correspondence
- Schedule meetings and appointments
- Operate office equipment
- Perform other duties as may be assigned

Knowledge, Skills and Abilities:

- Excellent written and verbal communication skills
- Customer service mentality
- Dependable and personable
- Demonstrate ethical conduct and confidentiality
- General knowledge of office protocol and procedures
- Resourceful problem solving skills
- Organized, meticulous, detail-oriented and able to multitask
- Ability to work independently and within a team environment

Qualifications:

- Previous experience in financial services industry is desirable
- Proficiency in Microsoft Word, Excel, PowerPoint and Outlook is essential
- Experience with Customer Relationship Management (CRM) systems is a plus

Salary and Benefits:

Madison Wealth Management offers attractive pay and benefits that are competitive based on industry standards.

Interested applicants should forward their resumes to:

Jeanne Sands, FPQP™

Madison Wealth Management

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Madison Wealth Management is an Equal Opportunity Employer

www.madisonadvisors.com