The Rice Partnership
Wealth. Management.

The Rice Partnership – Client Service Associate

Firm Information

The Rice Partnership
1304 Santa Rosa Street
San Luis Obispo, CA 93401
www.TheRicePartnership.com

The Rice Partnership is a boutique wealth management firm with offices in San Luis Obispo, Honolulu, and Maui. We offer wholistic wealth management services including asset management, family office, and financial advisory services.

Position Description

Title: Client Service Associate
Reports to: Lead Advisor, San Luis Obispo Office
Benefits: No
Status: Part-time

Job Description

The Client Service Associate (CSA) provides technical support to the Lead Advisors and performs an array of administrative duties. The CSA is integral in maintaining and strengthening the firm's relationship with new and existing clients.

Duties and Responsibilities

The Client Service Associate can expect to focus in the following areas:

1. Provides technical support for the lead advisor; including but not limited to: opening and maintaining client accounts, preparing account paperwork, written correspondence, client reports and presentations.

2. Responsibilities include assisting with Financial Planning and Trade Rebalancing; including but not limited to: gathering, organizing, and analyzing client data, preparing

financial plans and presentations for review by Lead Advisor, and utilizing rebalancing software to prepare trade recommendations.

3. May participate in client meetings and events but not in an advisory capacity; including but not limited to: assist with planning, hosting, and follow up of client meetings and events.

4. This position has no decision-making authority on client matters.

Qualifications

The Client Service Associate position typically requires the following qualifications:

- Must be a self-starter and take initiative
- Strong project management skills—organized, detail-oriented and able to multitask and prioritize
- Good written and verbal communication skills
- Good technical skills including the ability to learn new software programs
- Ability to interact professionally with clients and team members
- Desire/ability to work successfully in a small company environment
- Proficiency with Word, Excel, PowerPoint and Outlook required
- Bachelor or Associate's Degree preferred

Salary and Benefits

- Compensation is competitive based on industry standards.
- Pay will be based on experience.

Application Process

- To apply for this position, submit a current resume and a brief cover letter to ashley@thericepartnership.com
- Applying for this position may require certain background checks.

Contact Information

Contact Name: Ashley Wilken, CFP®
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The Rice Partnership is an Equal Opportunity Employer