The Rice Partnership
Wealth. Management.

The Rice Partnership – Client Service Associate

Firm Information

The Rice Partnership

San Luis Obispo Office	Paso Robles Office
1304 Santa Rosa Street	104 Gateway Center Drive #C
San Luis Obispo, CA 93401	Paso Robles, CA 93446

www.TheRicePartnership.com

The Rice Partnership is a boutique wealth management firm with offices in San Luis Obispo, Paso Robles, Honolulu, and Maui. We offer holistic 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/Paso Robles Offices
Benefits: No
Status: Part-time (20-30 hours per week)

Job Description

The Client Service Associate (CSA) provides technical support to the Lead Advisor(s) 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.

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2. Responsibilities include assisting with data input; including but not limited to: gathering, organizing, and analyzing client data; preparing presentations for review by Lead Advisor,

3. May participate in client meetings and events but not in an advisory capacity; including but not limited to: scheduling, 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
- Excellent 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

- Pay/benefits are competitive based on industry standards.
- Hourly wage will be based on experience

Application Process

- To apply for this position, submit 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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