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## Client Service Associate Resume

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### Job Objective

To obtain a Client Service Associate position in a company that provides an open environment with many opportunities for continuous growth.

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### Summary Skills:

Remarkable experience in client service, and supporting the financial advisor  
Proven expertise in providing account information to clients and Financial Advisors  
Skilled in handling telephones, mailing, filing and processing forms  
Proficient in MS Outlook, Word, Excel and PowerPoint  
Familiarity with CLOAS, Tracking, Client Manager, and GUI systems  
Amazing ability to process and examine client requests and transactions  
Ability to work independently with strong administrative and problem solving skills

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### Work Experience:

Client Service Associate, August 2005 to till date  
Bremer Financial Services, Melrose, MA

- Supported daily requests and requirements of clients for wealth management.
- Ensured updating company records, presentations and client information.
- Prepared notes on teleconferences and client meetings.
- Scheduled and organized meetings with clients as required.
- Maintained client possessions inventory and assisted in creating proposals.
- Responded to statements, investment and cash distributions related client requests.

Client Service Associate, May 2000 to July 2005  
OppenheimerFunds, Melrose, MA

- Established, developed, maintain and update client, files for the team.
  - Provided service satisfaction to clients by responding to all client queries.
  - Computed and Maintained and record trade uploads in workflow system.
  - Managed new account process for new and existing clients.
  - Collaborated with the operations team to collect account specific data.
  - Prepared reports, advertising presentations and other client stuff as needed.
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### Education:

Bachelor of Arts in Business Management, Thomas Jefferson University, Pennsylvania, PA

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