Client Service Associate

GRAND RAPIDS, MICHIGAN · FULL TIME

Wood Wealth Management is an independent wealth-management practice in Grand Rapids, Michigan. As outdoor enthusiasts, we liken our role to a guide that helps prepare and navigate your experience — and the Client Service Associate is the person who keeps that experience running. You are the first response to a client request, the order behind every meeting, and the operational support our advisors depend on.

This role suits someone who takes ownership of their work, follows a process through to completion without being asked twice, and finds real satisfaction in a well-organized file.

LOCATION	SCHEDULE	EXPERIENCE
Grand Rapids, MI	Full time, in office	5+ years

WHAT YOU WILL DO

- Respond to and execute client requests in a timely and professional manner
- Handle client paperwork from first signature through to filing
- Maintain and organize the firm's document management system
- Provide administrative and operational support to advisors
- Prepare for client meetings, including gathering and organizing client information
- Coordinate scheduling for client meetings, in person and virtual
- Track, follow up on, and document tasks within the CRM system

- Participate in team meetings and contribute to overall team success

WHAT YOU BRING

- 5+ years of operations or administrative experience, preferably in financial services, healthcare, or higher education
- Proficiency in Microsoft Word, Excel, and Outlook
- Tech-savvy, with the ability to learn multiple systems and platforms
- Strong attention to detail and organizational skills
- A positive, professional, client-service-oriented demeanor
- The ability to follow a process and manage tasks through to completion independently
- Ownership of your role

HOW WE WORK

Four things shape how we serve clients. If they describe how you already work, this is a good fit.

The relationship is the work

ONGOING, NOT TRANSACTIONAL

We believe in having a team, a plan, and an ongoing relationship to achieve a client's goals. You are part of that relationship, not adjacent to it.

Warmth, held to a standard

PROFESSIONAL AND PERSONAL

Clients should feel known when they call and confident when they hang up. Both matter, and neither substitutes for the other.

Listen, then anticipate

A STEP AHEAD OF THE ASK

We take time to learn a client's values and priorities before crafting solutions. Listening closely enough means you often see what a client or an advisor will need next, and have it ready before anyone asks.

Details are the service

PRECISE, AND BOTHERED BY ERRORS

A misspelled name, a wrong account number, a form that comes back unsigned: small errors are what erode a client's confidence, and we would rather catch them than explain them. You check your own work, dislike leaving a loose end, and see nothing tedious in getting it right the first time. Nothing is dropped and nothing waits for a reminder.

HOURS AND LOCATION

WEEKLY SCHEDULE

Monday through Thursday, 8:00 a.m. to 4:30 p.m.
Friday, 8:00 a.m. to 12:00 p.m.

WHERE YOU WILL WORK

Our office in Grand Rapids, Michigan. This is an in-person role alongside the advisory team.

COMPENSATION AND BENEFITS

Base salary is $75,000 – $80,000, commensurate with experience, with bonus opportunities available.

- 401[k] retirement plan
- Half-day Fridays, year round
- $500 professional apparel stipend, for an in-office role
- Three weeks of paid time off
- Bonus opportunities

Begin the conversation.

HOW TO APPLY

Apply through our website at https://www.wood-wealth.com/contact. with your resume and cover letter. Tell us where you have taken ownership of a process and carried it through. We read every application and will be in touch about next steps.