Operations / Client Service Associate

Location: Falls Church, VA

Job Type: Full-time, Flex hours, Remote 3 days/week

CJM is a leading financial advisory firm dedicated to providing comprehensive wealth management solutions to our clients. With a focus on personalized service and strategic financial planning, we empower individuals and families to achieve their financial goals and secure their financial future.

Position Overview:
The Operations Associate / Client Service Associate (CSA) is a key member of the firm's operations team, supporting Financial Planners and managing the day-to-day operational needs that help deliver a seamless, high-touch client experience.

Responsibilities:

1. Own operational and service requests from initiation through completion, ensuring accurate and timely processing and follow-up.
2. Prepare and process account paperwork, including new accounts, maintenance, transfers, money movement, beneficiary changes, and other custodian-related requests.
3. Maintain accurate client and household information within the firm's CRM and other systems.
4. Support client meeting preparation by gathering information, generating reports, maintaining records, and coordinating follow-up items.
5. Assist with client onboarding, asset transfers, cash management, data reconciliation, and performance reporting.
6. Serve as a liaison with custodians, vendors, and internal team members to research and resolve operational issues.
7. Identify and escalate operational issues or process improvements that may impact efficiency or service quality.
8. Maintain client confidentiality and adhere to firm compliance and regulatory requirements.

Qualifications:

1. Bachelor's degree in Business, Finance, or a related field preferred, or equivalent experience.
2. 2–4 years of professional experience, preferably in financial planning, wealth management, or the RIA industry.
3. Strong attention to detail, organizational skills, and ability to manage multiple requests through completion.
4. Comfortable with technology and committed to continuous learning and process improvement.
5. Experience with Salesforce, Orion, Pershing, or similar wealth management platforms is highly desirable.
6. Strong written and verbal communication skills and a high level of professionalism.

Benefits:

- Competitive salary and bonus commensurate with experience.
- Comprehensive benefits package, including employer-paid health insurance, HSA, 401(k) with profit sharing and matching, E-ZPass reimbursement, and paid time off.
- Alternate Fridays off during the summer, flexible start times, hybrid work arrangement, and volunteer days.
- Professional development opportunities, including FPA membership, conference attendance, and continuing education support.
- Collaborative work environment focused on teamwork, learning, and professional growth.

Salary Range: $60,000-$80,000 annually, plus eligibility for annual bonus and company benefits.

Click here to apply →

cjmltd.com (703) 425-0700
3110 Fairview Park Drive Suite 900, Falls Church, VA 22042

CJM WEALTH ADVISERS