GV Financial
ADVISORS

# Client Service Associate

**Company Information**
GV Financial Advisors is an Atlanta-based, privately-owned company that offers Guided Wealth Transformation™ to successful families. We seek to help our clients recognize their true desires and motivations in terms of lifestyle, retirement, and legacy and then to develop realistic plans for realization of their goals. Bringing clarity to what our clients really desire, we are able to join together all of the different elements of financial planning into a comprehensive game plan devoted to achieving those ambitions.

There are four core values that serve as the guiding principles for everything that we say and do, both with our clients and our team members:

- ***We do what is right.*** We are guided at all times by the principles of ethics and integrity. We are honest not simply because it is good for business, but because it is the right thing to do.
- ***We do what is in our clients' best interest.*** We serve as advocates for our clients. No one outside of family members will care more about our clients' financial futures than GV Financial Advisors.
- ***We strive to be more than fair.*** We set and maintain the highest standards in our relationships with our clients, other professionals, and our employees.
- ***We take responsibility for all we say and do.*** Our clients place enormous trust in us and in our recommendations. We take that responsibility to heart and accept full responsibility for our actions and recommendations. Our job is to deliver the advice and services our clients expect and deserve. We know we only win when our clients win.

**Position Information**
The successful candidate will have experience providing administrative support to financial advisors.

**Responsibilities:**
- Preparing paperwork for client meetings
- Completing applications
- Delivering seamless implementation of services and products
- Taking client calls
- Taking meeting notes
- Drafting and proofreading letters & email communications to clients
- Keeping advisors and associate advisors informed of the status of various projects

- Maintaining compliance with regulatory requirements
- Filing and other miscellaneous administrative tasks

While a Series 7 and the Life & Health Insurance License are not required, they are strongly preferred. This position requires strong communication skills, a high degree of detail orientation, and a great deal of diplomacy.

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