



# GV Financial

## A D V I S O R S

### 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 Client Management Group at GV Financial Advisors consists of a team of professionals who are responsible for ensuring that our prospects and clients receive outstanding service.

The primary function of the Client Service Associate in this department is to support GV's Associate Advisors as they deliver service to these prospects and clients.

**Responsibilities:**

- Preparing paperwork for client meetings, performing research as necessary to ensure that this paperwork is completed accurately
- Completing applications
- Delivering seamless implementation of services and products
- Taking client calls – determine which matters can be handled independently and which should be referred to the Associate Advisor or other team member
- Coordinating with other team members to ensure that the team's goals and deadlines are met
- Respond to client inquiries and/or issues as appropriate
- Taking meeting notes
- Prepare, edit and proofread various types of client correspondence
- Keeping advisors and associate advisors informed of the status of various projects
- Maintaining compliance with regulatory requirements
- Filing and other miscellaneous administrative tasks

**Requirements:**

- Active Series 7 license
- Minimum of 2 years of related experience – candidates without related experience will not be considered
- High level of attention to detail
- Ability to consistently deliver high quality results
- Goal- and service-oriented professional who is comfortable in a highly team-oriented environment
- Excellent verbal and written communication skills
- Strong work ethic

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