

Sr. Client Service Associate

ABOUT AGH:

AGH Wealth Management, as a division of AGH provides investment advisory and comprehensive wealth planning services for organizations and individuals, offering professional guidance and strategies to help build, preserve, and protect wealth. AGH, its parent organization, is one of the top 200 CPA and advisory firms in the U.S., AGH serves closely held and privately owned entrepreneurial firms and high-net-worth individuals and families. AGH is based in the central U.S., but the firm's reach and specialized expertise available to clients spans the globe.

POSITION SUMMARY:

The Senior Client Services Associate provides high-level office and client support through the implementation and oversight of administrative systems, procedures, and policies. This role manages administrative projects, delivers client service support, contributes to marketing initiatives, and serves as a trainer and mentor to Client Services Associates.

ESSENTIAL RESPONSIBILITIES:

Client Service & Relationship Support

- Deliver high-quality professional service to firm clientele, with a focus on top-tier clients.
- Perform account opening and ongoing service functions for high-value client assets.
- Process and service insurance applications and insurance-based products.
- Monitor, track, and resolve client service needs, requests, and system notifications.
- Provide additional support as needed to ensure consistent service delivery across all clients.

Meeting & Reporting Support

- Schedule and coordinate meetings for top-tier clients, delegating tasks as appropriate.
- Prepare account reports and supporting materials for client meetings.

Operations & Administrative Management

- Manage annual service requirements, including RMDs, QCDs, and other recurring operational tasks.
- Oversee electronic filing and organization of client and office documentation, providing support as needed to ensure accuracy and compliance.

Projects & Firm Initiatives

- Lead operational and administrative projects as assigned by management (e.g., client surveys, account service initiatives).
- Assist in the planning and execution of client and prospective client events.

QUALIFICATIONS:

- Bachelor's degree preferred
- 3-5 years' experience with broker dealers
- Proficiency in Microsoft Word, Excel, and Outlook required
- Experience actively using firm CRM systems and related tools
- Excellent written and verbal communication skills
- Strong task and time management skills
- Demonstrated problem-solving abilities



- High level of accuracy and attention to detail

WORK ENVIRONMENT

This position is an in-office role and requires regular, on-site presence during standard business hours. The Senior Client Services Associate works in a professional office setting that involves frequent interaction with clients, advisors, and internal team members. The role requires the ability to manage multiple priorities, collaborate across departments, and maintain a high level of confidentiality and professionalism in a fast-paced environment.

WHY WORK FOR US:

At AGH, you will find an environment where good work is rewarded, and growth is valued. AGH offers competitive wages to qualified individuals and the opportunity to grow professionally and personally through diverse work experience and formal training. Our top five people initiatives are:

- A challenging variety of work in a continuous learning environment
- Career/life integration
- Flexible work environment with great opportunity for advancement
- Ability to make a difference with clients and influence the AGH culture
- Individualized career pathing