CapTrust
WEALTH ADVISORS

Senior Client Service Associate

Experienced and equipped to foster an exceptional client experience.

CapTrust Wealth Advisors, located on 8th Street in beautiful downtown Holland, is seeking a full-time **Senior Client Service Associate**. This in-person role offers an opportunity for an experienced, service-oriented professional to play a key role within a growing wealth management firm.

At CapTrust, our mission is to enrich the lives of our clients, colleagues, and communities through sound financial advice, integrity, and a commitment to exceptional service. To learn more, visit www.ctwealth.com.

Why this role matters

The Senior Client Service Associate plays a critical role in shaping the client experience at CapTrust. This position blends deep client service expertise with strong relational skills, serving as a trusted resource across the firm and a strategic member of a high performing Client Service Team.

Grounded in industry knowledge and fueled by intellectual curiosity, the Senior CSA sets the standard for excellence—driving continuous improvement, embracing change, and modeling professionalism in every interaction. Beyond executing core responsibilities at a high level, this role provides consistently excellent service day-to-day through advanced critical thinking and problem solving for complicated client situations.

Success in this role requires sound judgment and strong analytical skills to navigate complex client needs and deliver thoughtful, effective service solutions. For the right team member, this is an opportunity to make a meaningful impact—strengthening client relationships, elevating the team, and contributing to the long-term success of the firm.

What You'll Do

Anchor the Client Service Team

- Set priorities, ensure accuracy and consistency, and serve as an escalation point
- Partner closely with advisors and internal teams to deliver an exceptional client experience

Strengthen Client Service Systems & Processes

- Define efficient, scalable workflows and best practices
- Support continuous improvement while maintaining strong service and compliance standards

Apply Deep Client Service Expertise

- Develop a comprehensive, end-to-end understanding of the client experience, from onboarding through ongoing service and life event transitions

- Serve as a subject matter resource for the Client Service Team, advisors, and internal partners on complex client service matters
- Ensure high standards of accuracy, timeliness, and professionalism across all client service activities
- Anticipate needs proactively and guiding thoughtful service solutions that are client focused
- Support and oversee core client service functions, including:
    - Account opening, onboarding, and ongoing account maintenance
    - Online access setup and troubleshooting
    - Money movements, transfers and recurring service needs
    - Gifting of securities and charitable strategies
    - Qualified Charitable Distributions (QCDs)
    - Required Minimum Distributions (RMDs)
    - Estate related service needs
    - Cost basis updates and reconciliation
    - Separately Managed Accounts (SMAs) and alternative investments
    - Donor advised funds (NCF, Fidelity, CFHZ, Barnabas)
    - Tax document distribution and client support

What We're Looking For

- Background or strong interest in client service, technology, or financial operations
- Comfortable working with data management systems, clients, and cross functional teams
- Detail oriented and analytical, with the ability to identify issues and drive them to resolution
- Curious and proactive, with an interest in process improvement, and technology enabled solutions
- Able to balance service execution with problem-solving and continuous improvement
- Organized, reliable, and calm under deadlines
- Collaborative team player with a client first mindset
- High integrity when handling sensitive client and financial information
- Interested in building a long-term career in client service operations
- Experience in training or leading team members
- Willingness to obtain securities licensing

Why you'll like working here

- You'll play an active role in delivering a high-quality client experience
- You'll gain hands-on exposure to the full lifecycle of client service and operations
- You'll work closely with an experienced team to evaluate and address client needs
- Your ideas to improve client service processes, systems, and workflows will be encouraged and valued

Let's Talk

We're looking for smart, thoughtful people who want real responsibility and room to grow.
If that sounds like you, connect with us at talent@ctwealth.com. We're excited to start the conversation.