YESKE BUIE

Yeske Buie Job Description – Client Support Specialist

Yeske Buie, one of the most respected and influential financial planning firms in the country, is seeking to hire a self-motivated, organized, and adaptable utility player with a resilient, upbeat attitude and a hard work ethic for the role of Client Support Specialist in our San Francisco, CA or Vienna, VA office.

About Yeske Buie

On paper, Yeske Buie is an independent, fee-only financial planning firm with $800M in assets under management. We specialize in: building lifelong relationships with clients through deep and ongoing discovery and trust building; providing them with grounded investing that is implemented in a creative and disciplined way; helping them safely spend from their portfolios; and, working together to navigate intergenerational wealth planning.

Beneath the surface, we're much more than that. At Yeske Buie, our mission is to empower people to pursue their limitless vision for their life – we call this their Live Big® life. This mission, along with our six core values, serve as the drivers for how we serve our Clients and interact as a team.

About the Role

While we are a process-oriented and evidenced-based firm that is disciplined in our approach to serving Clients, we embrace the flexibility needed to truly serve the interests of our Clients and their unique circumstances, which is always our most fundamental and top priority. So, while no two days will be exactly alike in elevating the client experience, here's what you are likely to experience during a typical work week:

- **Completing Operations and Administrative Tasks**
  - *As a member of the Yeske Buie Support Team, you will support the firm and the Financial Planning Team via responsibilities that include reviewing Client transactions, daily data entry across our portfolio accounting and trading programs, performing day-to-day office administration including mail, greeting Clients, answering phones, scanning, ordering supplies, and implementing office policies and procedures, supporting Yeske Buie's compliance department and administering program pieces where applicable, and conducting routine database clean up and maintenance in order to maintain data integrity.*
- **Serving as Client Onboarding Liaison**

- *Entering information into our systems for new Clients and the other professionals on their team and reviewing and updating the Client Private Page® to ensure it meets the Yeske Buie standard.*

- **Preparing and Sending Client Paperwork**
  - *This incredibly important work includes compiling account paperwork and assisting Clients through the completion of the paperwork, moving money, opening/closing accounts, scanning, filing, etc. You will be expected to demonstrate proficiency in using electronic delivery and signature, and to keep on top of Schwab's ongoing improvements to make client accounts and paperwork more secure and easier to complete.*
- **Gathering Financial Planning Data from Clients**
  - *This includes drafting and sending Client emails, fielding Client calls, entering Client information into our databases, and completing related tasks.*
- **Preparing Financial Planning Reports**
  - *You will turn that collected data into powerful financial planning and financial hygiene reports and proposing policy-based recommendations to the Financial Planning Team. In most instances, your work will be posted on a Client's unique Client Private Page® after review by the Lead Advisor.*
- **Completing Financial Planning and Asset Management Research and Projects**
  - *Sometimes planned, sometimes unplanned, you'll be asked to lean in as a utility player to research best practices to improve our processes and implement new strategies.*
- **Meeting with the Team**
  - *You will primarily focus on individual tasks and responsibilities, although working in teams and sub-teams is very much a part of our culture. You will participate in all staff and full company meetings, as well as our annual staff retreats.*
- **Opportunities for Growth**
  - *As we learn more about your skillset and interests, we'll work together to envision how the role will develop and other duties will be assigned.*

About the Ideal Candidate

Someone who will excel in this position will…

- Hold a Bachelor's degree from an accredited college or university.
- Take a Client-first approach to their work.
- Be able to manage and prioritize tasks and projects through to their successful conclusion.
- Have strong analytical and financial skills and be detail-oriented with a high degree of accuracy.

- Be adept and savvy with software and technology.
- Demonstrate excellent written and verbal communication skills.
- Solve problems with instincts to think creatively, be resourceful, and adapt.
- Genuinely enjoy supporting others and find collective success to be fulfilling.
- Be trustworthy, ethical, hard-working, and professional.

About the Future

This position is an opportunity to build a fulfilling, long-term career focused on exceptional client service and technical financial planning support. Your career is your own unique journey, and we look forward to working with you to design and support your personal and professional goals to empower you to pursue your Live Big® life.

We are happy to provide a competitive salary with bonus potential, fully paid (individual) health benefits, 401(k) with company match, a generous vacation policy, regular team bonding events (i.e., annual staff retreats, social time, etc.), and possible financial support for continuing education, certifications, and conference attendance.

Additionally, Yeske Buie is pleased to offer employees a hybrid work schedule. All employees are expected to work from our physical offices from Tuesday through Thursday, and may work from their own virtual office on Monday and Friday.

Lastly, in light of the COVID-19 pandemic, it is an expectation that every member of the Yeske Buie team has received the COVID-19 vaccine/recommended boosters and will provide that documentation during the new hire process.