



## **Client Service Representative**

Compass Ion Advisors is a trusted wealth management firm dedicated to helping clients achieve success through thoughtful investment strategies and financial planning. We are seeking an experienced professional to join our team in a client service role. Find out more about our firm [here](#).

### **What We're Looking For:**

- 2-4 years of experience in the financial services industry
- Familiarity with financial platforms such as Schwab and Fidelity
- Proficiency in industry-standard software like Salesforce and Microsoft Office Suite
- Exceptional attention to detail
- Strong organizational and communication skills
- A proactive and eager-to-learn attitude

### **What We Offer:**

- Quarterly bonus: Percentage of base pay based on performance, combined with firm profits.
- 3% 401(k) match.
- Comprehensive health, vision, and dental insurance, as well as long-term disability, and life insurance.
- Hybrid work schedule available after completing training

At Compass Ion Advisors, we value the growth of our team and offer a supportive, collaborative environment. If you're passionate about client service and eager to contribute to a thriving wealth management firm, we'd love to hear from you!