



Job Title:

Service Associate

Position Type:

Full-Time

Work Location:

1 Research Drive, Suite 100B
Westborough, MA 01581

Company Overview:

Financial Foundations is an independent financial planning, wealth management, and consulting firm. We live by our motto: Complicated Made Simple®. We take this mantra seriously and strive to simplify our clients' lives by providing a variety of comprehensive services and tools. Financial Foundations values its relationship with Commonwealth Financial Network®, our premier broker/dealer.

Join our dynamic team of motivated individuals focused on exceptional service and growth. Embrace the culture of entrepreneurship and collaboration while attaining your personal career goals.

Job Overview:

The candidate best suited for this role is someone who excels in a fast-paced environment while managing multiple projects with varying deadlines. This person needs to have exceptional attention to detail and will be responsible for processing new business, engaging with clients, facilitating client service requests, and maintaining account documents.

Primary Responsibilities and Duties:

- Comply with all FINRA/SEC/Commonwealth Financial Network compliance regulations
- Work closely with advisors on day-to-day operations

- Facilitate client service requests including account openings/account updates and asset transfers
- Gather information and prepare materials for client meetings
- Monitor and provide support for ongoing projects
- Maintain organized client files and electronic document storage
- Guide new clients through online account access
- Assist with client mailings
- Help develop and improve processes for tracking active business tasks

Requirements/Qualifications:

- Bachelor's degree
- 3-5 years financial industry experience
- Positive attitude and exemplary customer service skills
- Exceptional attention to detail
- Preferred experience with MS Office Suite (Outlook, Word, and Excel)
- Excellent organizational and time management skills
- Ability to work independently and cooperatively in fast-paced environment
- Ability to handle multiple tasks and operate under tight deadlines

Our Benefits:

401(k), Health insurance, Dental insurance, Disability insurance, Flexible spending account, Life insurance, Paid time off, Competitive bonus pay