Client Service Representative – Wealth Management

Carmel, IN · Full-time · **$65k–85k**

Client Service Representative – Wealth Management
Location: Carmel, IN (On-site)
Salary: $65,000–$85,000 + Discretionary Bonus
Benefits: Medical, Dental, 401(k) w/ match, Holidays, PTO
Job Type: Full-Time | On-site
Typical Hours: Monday–Friday, 8:00 AM–4:30 PM ET
Start Date: ASAP
Sponsorship is not available

Client Service Representative Description

Our client in the wealth management industry is looking for a Client Service Representative to join their team in Carmel, IN. In this role, you will support financial advisors and serve as a primary point of contact for clients, managing account requests, transactions, scheduling, and ongoing service needs. Our client is looking for someone with at least 2 years of relevant financial services experience, a strong understanding of investment and retirement accounts, and the ability to manage client requests from start to finish. To be successful, you must be an excellent communicator, detail-oriented, adaptable, and comfortable working with clients from diverse financial backgrounds. This is a great opportunity to join an established financial advisory firm with a supportive, long-tenured team, hands-on training, and the independence to manage your day without micromanagement.

Client Service Representative Responsibilities

- Serve as a primary contact for clients and respond to daily service requests
- Process account transfers, distributions, and other financial transactions
- Assist with IRA servicing, required minimum distributions (RMDs), and rollovers
- Coordinate account openings, maintenance, and client onboarding
- Manage advisor calendars, client scheduling, and meeting follow-ups
- Maintain accurate client records and track service requests through completion
- Collaborate with financial advisors and custodians to resolve account issues
- Provide timely updates and follow-through on client requests

Client Service Representative Qualifications

- 2+ years of relevant financial services experience required
- Knowledge of investment and retirement accounts required
- Familiarity with RMDs, account transfers, account registrations and tax implications required
- Proficiency with Microsoft Office required

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