



Client Service Manager

Reports to: CEO
Location: Bala Cynwyd, PA
Benefits: Yes
Status: Full-Time, Exempt

About Us: Odyssey Capital Advisors (OCA) is a growing independent registered investment advisory firm located in Bala Cynwyd, Pennsylvania. We are an ensemble business focused on Investment Management, Business Consulting, and Financial Planning. Trust and transparency are at the heart of who we are and what we do as we help our clients reach their professional and financial goals.

About the Role: Odyssey Capital Advisors is seeking a Client Service Manager to join our team. This role is responsible for working alongside the Chief Executive Officer spearheading various firm-wide initiatives, facilitating business and client events, and responding to client and vendor inquiries. They will also assist with various daily operations of the business. The position necessitates tremendous organizational skills, excellent attention to detail, and the ability to perform multiple tasks successfully. In addition, this position requires a welcoming disposition and strong communication and interactive skills, as this person will interact with clients. The ability to learn new programs quickly is paramount to succeed in this position. Certain responsibilities are noted below.

The impact you can make:

- Manage full cycle client onboarding and workflow processes
 - Serve as point of contact for client's service-related issues, questions, or concerns
 - Provide meeting follow up notes to attendees and handle action items
 - Spearhead client annual reviews (including scheduling and preparing review documentation)
 - Oversee and manage CRM database, client touch points, and monthly reports
 - Work with Business Development team to help drive firm goals
 - Work with Compliance team in accordance with industry regulations
 - Develop client communication materials
 - Attend and facilitate all company and client events and track event follow-up
 - Manage office vendor relationships
 - Other projects and assignments as needed
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What excites you:

- Interacting with and learning who our clients are
- Developing event ideas and seeing your vision come to life
- Closing the loop and crossing things off the to-do list
- Technology and utilizing SAAS to enhance efficiency at work
- Exemplifying very high professional standards of honesty and integrity
- Social media branding



What you bring to OCA:

- Proven work experience as financial service assistant or similar role (4 years of more preferred)
- Familiarity with RIA operations and utilizing platforms such as Schwab Advisor Center, RedTail (CRM), and ShareFile
- Experience exercising discretion and confidentiality with sensitive information
- Excellent organizational skills and superior attention to detail
- Ability to handle multiple projects and tasks, prioritizing and meeting deadlines
- Strong communication skills (via phone, email, and in-person)
- Knowledge of office procedures and office equipment
- Ability to work effectively both autonomously and as part of a team

What OCA brings to you:

- Salary of \$70-74k based on experience
- Benefits include health care, vision; 401(k) plan with firm match, paid time off (PTO), professional development support, and volunteer time off
- Culture of recognition where employees acknowledge and reward great work of their colleagues

To apply:

- Submit your resume to recruiting@odysseyadvice.com

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