Job Posting: Client Service Associate

Position Summary:

We are seeking a **Client Service Associate** to join our team and provide exceptional service to our valued clients. This part-time position begins at 20 hours per week, with some flexibility to determine days per week and hours per day. The role is on-site in our Dallas office, with pay ranging from **$17–$25 per hour** depending on experience.

This role requires outstanding organizational skills, attention to detail, and the ability to manage multiple tasks efficiently. A tech-savvy mindset and the ability to quickly learn new systems are essential for success. Applicants with **Advyzon software experience** will be given priority.

Key Responsibilities:

• Assist with processing, service requests, and problem resolution, ensuring timely and accurate responses.

• Collect and organize incoming client information and documentation.

• Maintain and update client files and records in the CRM system.

• Answer phone calls, transfer calls to advisors, or assist with documentation inquiries (e.g., account opening or internal documents).

• Backup support as needed.

Qualifications:

• Excellent communication and interpersonal skills.

• A focus on delivering exceptional service.

• Ability to handle challenging situations with patience and professionalism.

• Strong organizational and multitasking abilities.

• Proficiency in basic computer applications and systems.

• Previous customer service experience is a plus.

Details:

• **Location:** On-site in Dallas office.

• **Hours:** Part-time, 20 hours per week, with flexible scheduling.

• **Pay Range:** $17–$25 per hour, based on experience.

This position offers an opportunity to work in a dynamic and supportive environment where you'll play a key role in ensuring a seamless client experience. If you are detail-oriented, highly motivated, and passionate about client service, we encourage you to apply.

How to Apply:

Please submit your resume and cover letter detailing your qualifications and interest in the role.