Client Service and/or Operations Assistant

KUTSCHER BENNER BARSNESS & STEVENS INC.
FINANCIAL COUNSEL

Target start date: February 2025

Status: Full-time

Company: Kutscher Benner Barsness & Stevens, Inc. (KBBS Financial)
705 Second Avenue, Suite 800
Seattle, WA 98104
www.kbbsfinancial.com

Email (preferred): info@kbbsfinancial.com

Description
Kutscher Benner Barsness & Stevens, Inc.—an independent, fee-only, comprehensive financial counseling firm—seeks a full-time Operations Associate to join our team of professionals, whose clients include individuals, families and trustees.

Duties and Responsibilities
The Operations Associate's primary function is to assist the firm's planners with the following duties and responsibilities:

- Oversee operations of cloud-based custodian account database (Tamarac);
- Daily transaction review and reconciliation (Tamarac);
- Reporting, trading, billing and client portal maintenance (Tamarac);
- Primary contact with client custodians (almost exclusively Schwab)
- Onboarding new clients, establishing accounts, and coordinating asset transfers;
- Maintain and update XLR8 CRM (Salesforce);
- Compiling clients' annual financial information into balance sheets, cash flow and tax projections (primarily through Excel);
- Annual tax information coordination with client and accountants;
- Quarterly newsletter distribution through Constant Contact and other email channels;
- Streamline and maintain back office operations

Qualifications
We seek candidates who are passionate about financial fitness and literacy. Candidates must have demonstrated an exceptional ability to write, communicate verbally, evaluate and manipulate data, stay organized and work independently in support of a team. Other essential qualities include critical thinking, curiosity, a "self-starter" mentality, sociability, poise, creativity, discipline and perseverance.

Background and experience to be considered:

- A bachelor's degree and strong academic performance are also preferred
- Relevant work experience in another RIA or financial institution is desired;
- Familiarity with Schwab and/or SchwabInstitutional.com is a plus;
- Facility with Microsoft Excel and Tamarac is required;
- Industry qualifications (NASD/SEC series 63 66, 65 or 7) and/or enrollment in the Chartered Financial Analyst® (CFA), Certified Financial Planner® (CFP®), or a similar professional certification program are not required, but encouraged.

Compensation
We offer a competitive salary, generous 401(k), HSA, education support, transit assistance and medical, dental, vison and disability insurance.

Work Environment
Our team works collaboratively, with energy, imagination and focused deliberation, to bring insight and assurance to our clients. We love what we do and are looking for others to join us who share this ethos. We work a combination of remote work (1 to 2 days per week) and in office (2 (required) to 4 days per week).

Application Process
For consideration, please send a resume and one-page (max.) cover letter (*required*) to the email address above. Finalists for the position will be required to submit a writing sample and transcript, which will be given close consideration.