



## Client Services Associate

**Job Type: Full-time, Exempt**  
**Salary Range (DOE): \$45,000 - \$50,000**

### Job Summary:

Are you ready to kick-start your career in the financial services industry? Berger Financial Group is seeking a detail-oriented and dedicated individual to join our Central Services Team as a Client Services Associate. This role will offer you a unique opportunity to be a part of our ever-evolving financial firm as well as the ability to grow alongside motivated peers.

### Why work here?

- Competitive pay
- 100% Employee Owned (ESOP)
- Flexible Working Options
- 12 Paid Holidays & 15 Days of PTO to start
- Company Paid STD, LTD & Life Insurance
- FREE Financial Planning & Tax Preparation Services
- Continuing Education Funding

### Work Schedule:

- Monday - Friday, 8:00am - 4:00pm
- Ability to work from home 2 days per week after training (headquartered in Plymouth, MN)

### Responsibilities:

- Preparing essential account applications, including new account setup, asset transfers, and more, while maintaining regular communication with clients and advisors.
- Meticulously managing and organizing client documentation within our systems.
- Handling sensitive and confidential information with the highest level of discretion.
- Developing a strong understanding of the financial world and our unique process.
- Providing support for special projects and research when needed.

## Required Qualifications:

- Bachelor's degree in Finance, Economics, Business or similar.
- Excellent written and verbal communication skills for maintaining strong, professional client relationships.
- Strong computer skills to navigate the latest financial tools and technology.
- A proactive problem-solving approach and the ability to seek innovative solutions.
- Exceptional organizational skills and a strong attention to detail.
- A willingness to cross-train in different departments, enhancing your skill set.
- The openness and ability to learn and leverage new technologies.

## Meet BFG:

Headquartered in Plymouth, MN, BFG & has expanded to 7 other locations throughout the U.S. including, 3 in Minnesota, 2 in Arizona, 1 in Vermont and 1 in Maine. BFG remains the premier firm in this industry.

Initially founded as a tax practice in 1981, BFG has broadened its services to include:

- Financial & Retirement Planning
- Portfolio Development & Management
- Income Tax Planning & Preparation

We value individuals who can adapt to change, work both independently and as part of a team, and are dedicated to building a long-term career with us. Join us, and together, we'll navigate the financial industry's future while fostering your professional growth. At Berger Financial Group your journey begins, and the opportunities are abundant.

Please send your resume to [HR@bergerfinancialgroup.com](mailto:HR@bergerfinancialgroup.com)