

WORK VAPOR

Job Link: <https://workvapor.com/jobs/client-relationship-manager-25-37-financial-advisory-232378/>

HIRING ORGANIZATION

Navigator Bookkeeping

EMPLOYMENT TYPE

Part-time

JOB LOCATION

? Remote work from: United States

DATE POSTED

? 09/15/2026

CLIENT RELATIONSHIP MANAGER – \$25-\$37 – FINANCIAL ADVISORY

BASE SALARY

USD 25 - USD 37

DESCRIPTION

Client Relationship Manager

Company: Navigator Bookkeeping

Location: United States

Work Type: Fully Remote

Employment Type: W2, Full-time / Part-time

Pay: \$25–\$37 per hour

Contact Details

Email: nate@navigatorbookkeeping.us

Application: Resume + required video cover letter

About Navigator Bookkeeping

Navigator Bookkeeping is a bookkeeping and financial advisory firm serving therapists and private practice owners.

The company has worked mainly with mental health practices for seven years. It serves solo therapists, group practices, physical therapy practices, and other healthcare practices across the United States.

Navigator Bookkeeping focuses on helping practice owners understand their finances in simple terms. The team helps clients make better business decisions and avoid financial blind spots.

About the Position

Navigator Bookkeeping is hiring a Client Relationship Manager to manage client relationships.

The position will serve as the main client-facing contact for approximately 25–30 clients once fully ramped. A dedicated bookkeeper handles bookkeeping tasks such as classification, reconciliation, and month-end close.

The Client Relationship Manager owns the client relationship. The role focuses on financial meetings, client communication, business guidance, and identifying issues early.

Key Responsibilities

- Manage a portfolio of client relationships.
- Run monthly Zoom meetings with clients.
- Review financial statements with clients.
- Explain clinician profitability.
- Review cash flow.
- Discuss compensation models.
- Help clients plan for taxes.
- Review Profit First allocations.
- Answer client questions through email.
- Respond to client questions through Slack.
- Communicate quickly and clearly.
- Coordinate with bookkeepers.
- Confirm books are accurate and closed on time.
- Help clients think through business decisions.
- Discuss hiring decisions and compensation structures.
- Support questions about 1099 and W2 arrangements.
- Help clients evaluate benefits such as 401(k) plans.
- Identify financial issues before clients notice them.
- Build strong long-term client relationships.
- Support client retention and satisfaction.

Client Load

The position starts part-time with approximately 10–15 clients.

The client load will grow toward 25–30 clients during the first 6–9 months.

A full client load usually requires around 30–35 hours per week. The company states that 40 hours are not required to perform the work well.

Candidates who prefer to remain closer to part-time hours may also be considered.

Required Qualifications

- Experience managing client or account relationships.
- Experience in professional services, healthcare, or a similar environment is preferred.
- Experience working directly with clients.
- Strong communication skills.
- Strong written communication skills.
- Fast and clear email communication.

- Comfort discussing financial concepts.
- Ability to understand a P&L.
- Ability to explain financial information in simple language.
- Ability to lead meetings with business owners.
- Ability to handle difficult conversations professionally.
- Ability to give clients clear and honest guidance.
- Strong self-direction.
- Ability to manage a calendar independently.
- Ability to manage client relationships remotely.

Alternative Experience

Candidates may also be a good fit with experience in:

- Operations for a mental health practice.
- Administration for a healthcare practice.
- Business management for a private practice.
- Private practice financial or administrative support.

Preferred Qualifications

- QuickBooks Online experience.
- Therapy practice operations experience.
- Experience with EHR systems.
- Experience with insurance billing.
- Knowledge of clinician compensation models.
- Bookkeeping experience.
- Accounting experience.

Tools Used

- QuickBooks Online.
- Claude.
- Keeper.
- Slack.
- Loom.
- Zoom.
- Google Workspace.

Compensation

Pay is \$25–\$37 per hour based on experience and the size of the client book.

CRM compensation is tied to revenue from the clients served. Earnings can increase as the client portfolio grows.

Benefits

- 401(k).
- 401(k) company matching.
- Unlimited PTO.
- Home office stipend.
- Revenue share after one year.

- Flexible schedule.
- Fully remote W2 employment.
- Work from anywhere in the United States.

Schedule

The position starts part-time and can grow with the client load.

Employees set their schedules within reasonable limits. Client meetings must take place during business hours, but the specific working hours are largely flexible.

Onboarding and Training

New employees receive structured onboarding from the Training & Development Lead.

The onboarding period is expected to last 2–3 months.

Training includes shadowing live client meetings, gradually taking over client relationships, and receiving support while building confidence.

Work Environment

- Fully remote.
- United States-based.
- W2 employee position.
- Flexible schedule.
- Independent work environment.
- Collaborative team.
- Direct client interaction.
- No keystroke monitoring.

Why Work with Navigator Bookkeeping

The role focuses on client relationships and financial thinking rather than data entry.

A dedicated bookkeeper handles the accounting work. The Client Relationship Manager focuses on helping practice owners understand their financial position and make informed decisions.

The company is a small team with approximately twelve employees. Employees work closely together and have a direct impact on the business.

Application Requirements

Applicants must submit:

- Resume.
- Video cover letter.

The video cover letter should answer:

- Tell us about a difficult client relationship you handled well.
- What made the situation difficult?

- What did you do?
- What book are you reading right now?
- What else makes you a strong fit for this position?

Being comfortable on camera is required.

Applications without a video cover letter will not be considered.

How to Apply

Send your resume and video cover letter to:

nate@navigatorbookkeeping.us

Company Contact Information

Navigator Bookkeeping

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