

WORK VAPOR

Job Link: <https://workvapor.com/jobs/senior-client-service-manager-100k-110k-wealth-management-232449/>

SENIOR CLIENT SERVICE MANAGER – \$100K-\$110K – WEALTH MANAGEMENT

HIRING ORGANIZATION

Wealth Enhancement Group

EMPLOYMENT TYPE

Full-time

BASE SALARY

USD 57750 - USD 126000

JOB LOCATION

California, United States

? Remote work from: United States

DESCRIPTION

Senior Client Service Manager

Company: Wealth Enhancement Group

Location: United States

Work Type: Fully Remote

Employment Type: Full-time

Primary Team: Novato, CA

Base Salary: \$100,000–\$110,000 per year

DATE POSTED

? 09/23/2026

Contact Details

Accommodation Phone: +1 7634171700

Application: Apply through the employer application process

About Wealth Enhancement Group

Wealth Enhancement is an independent wealth management firm.

The company provides personalized financial planning and investment management services to more than 90,000 households across the United States.

About the Position

Wealth Enhancement Group is looking for a Senior Client Service Manager to support its Novato, California team.

This is a fully remote position. Candidates in the Central or Pacific Time Zone are welcome. Candidates near Novato may also have the option to work from the office.

The Senior Client Service Manager will serve as a trusted advisor to clients and financial advisors. The position will manage complex client service needs while helping the office maintain accurate and efficient operations.

The position also includes mentoring and supporting other client service team members.

Primary Responsibilities

Reception and Office Support

- Answer client phone calls.
- Respond to client messages.
- Send routine follow-ups.
- Send status updates.
- Prepare meeting reminders.
- Manage incoming client requests.
- Handle beneficiary updates.
- Process address changes.
- Respond to RMD questions.
- Order office supplies.
- Coordinate office maintenance.

New Client Onboarding

- Ensure prospect and new client paperwork is completed accurately.
- Follow up on fund transfers.
- Maintain the Salesforce database.
- Maintain client files.
- Research issues with the Broker/Dealer.
- Research issues with WEG Operations and vendors.
- Follow up on outstanding issues.
- Record incoming assets in the appropriate system.

Client Relationship Management

- Communicate with clients about their financial needs.
- Learn about each client's financial history.
- Prepare account transactions.
- Process trades.
- Handle deposits and withdrawals.
- Process required minimum distributions.
- Understand client requests.
- Determine the appropriate next steps.
- Resolve client service issues when possible.
- Escalate matters to financial advisors when needed.
- Support death claim processing.
- Coordinate with clients' tax or legal advisors when appropriate.

Client Review Preparation and Follow-Up

- Gather client information.
- Prepare materials for client meetings.
- Support client financial reviews.

- Conduct tax research related to 1099s.
- Complete client review follow-up tasks.
- Ensure action items are completed.

Industry and Product Knowledge

- Follow Wealth Enhancement suitability guidelines.
- Apply operational procedures accurately.
- Understand the company's sales model.
- Understand financial terminology.
- Understand financial products and services.
- Maintain working knowledge of annuities.
- Maintain working knowledge of mutual funds.
- Understand separately managed accounts.
- Understand fixed income products.
- Understand stocks and options.
- Understand alternative investments.
- Understand hedge funds.
- Understand charitable giving practices.
- Attend client service education events.
- Attend company training sessions.
- Participate in vendor presentations when needed.

Team and Corporate Support

- Assist financial advisors during client meetings.
- Mentor junior client service team members.
- Train team members.
- Resolve escalated client issues.
- Complete operational projects.
- Support process improvements.
- Communicate process updates to the team.
- Share sales updates.
- Support Advisor Team Operations.
- Help improve processes and systems.
- Support system upgrades.
- Participate in company learning sessions.
- Serve as a subject matter expert for company initiatives.
- Support new company rollouts.
- Manage vendors according to service level agreements.
- Perform other assigned duties.

Required Qualifications

- Bachelor's degree or equivalent experience preferred.
- 7–10+ years of industry experience required.
- Strong client-facing experience required.
- Salesforce experience required.
- Comparable CRM experience may be considered.
- Schwab experience required.
- Fidelity experience required.
- Pershing experience preferred.
- Strong knowledge of Word.

- Strong knowledge of Excel.
- Strong knowledge of Outlook.
- Strong knowledge of PowerPoint.
- Excellent verbal communication skills.
- Excellent written communication skills.
- Ability to work with clients and employees at all levels.
- Strong workflow management skills.
- Strong project prioritization skills.
- Good problem-solving skills.
- Strong attention to detail.
- Ability to meet deadlines.
- Ability to work under pressure.
- Ability to work as part of a team.
- Ability to support junior employees.
- Comfort learning new AI applications.
- Understanding of appropriate AI use cases and limitations.
- Ability to continue learning as AI technology develops.

Work Environment

- Fully remote position.
- United States-based.
- Central Time Zone candidates welcome.
- Pacific Time Zone candidates welcome.
- Novato-area candidates may work from the office.
- Client-facing financial services environment.
- Regular computer and telephone use.
- Ability to sit or stand for extended periods.
- Ability to file documents in high or low cabinets.

Compensation

The expected starting base salary is \$100,000–\$110,000 per year.

The full salary grade for this level is \$57,750–\$126,000 per year.

Final compensation may depend on experience, education, qualifications, skills, credentials, tenure, market factors, and other applicable considerations.

Benefits

- Professional training and development.
- Medical coverage.
- Dental coverage.
- Vision coverage.
- Health Savings Account with employer contribution.
- Flexible Spending Accounts.
- Life insurance.
- AD&D insurance.
- Short-term disability coverage.
- Long-term disability coverage.
- Workers' compensation.
- 401(k) with company match.

- Profit sharing.
- Wellness programs.
- Voluntary benefits including pet insurance.
- 18 days of annual PTO.
- 25 PTO days after 4 years of service.
- 12 paid holidays each year.
- Paid parental leave.
- Paid caregiver leave after 6 months of service.
- Tuition reimbursement.
- Licensing reimbursement.
- Credential reimbursement after applicable service requirements.

AI and Application Information

Wealth Enhancement may use AI tools during the initial resume screening process.

AI-supported evaluations are reviewed by the recruitment team. Candidate information is handled according to applicable data protection requirements.

Equal Opportunity

Wealth Enhancement is an Equal Opportunity Employer including for disabled individuals and veterans.

The organization participates in E-Verify.

Accommodation Contact

For reasonable accommodation during the application or selection process contact Human Resources at:

+1 7634171700

Company Contact Information

Wealth Enhancement Group

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Employment Type: Full-time

Primary Team: Novato, CA

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