



JOB DESCRIPTION

JOB TITLE:	Client Service Associate	SAFETY SENSITIVE:	No
FLSA STATUS:	Non-Exempt	DEPARTMENT:	Branson Wealth
DATE:	May 2026	REPORTS TO:	Financial Advisor

JOB SUMMARY

The Client Service Associate provides administrative, operational, and client service support for Branson Wealth Advisors. This role assists the Financial Advisor with client relationship management, appointment coordination, operational workflows, and account servicing.

ESSENTIAL DUTIES AND OTHER RESPONSIBILITIES

- General understanding of financial planning and advisory concepts.
- Provide general office and administrative support for the Financial Advisor.
- Support customer service efforts through phone, email, and in-person interactions.
- Maintain accurate client records and compliance documentation.
- Oversee prospect management and referral tracking within Ameriprise CRM and FI Referral Tools.
- Process and monitor client paperwork and account servicing activities in the Ameriprise network.
- Participate in onboarding and licensing progression requirements.
- Maintain confidentiality and professionalism in all interactions.
- Comply with company policies and procedures.
- Perform other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

- Demonstrates professionalism, dependability, integrity, and a strong commitment to client service.
- Excellent interpersonal, client service, written, and verbal communication skills.
- Strong attention to detail, organization, and time management skills with the ability to manage multiple priorities and deadlines.
- Knowledge of administrative and office procedures including file management, record keeping, and standard office practices.
- Proficiency in Microsoft Word, Excel, PowerPoint, and standard office equipment.
- Ability to quickly adapt to Ameriprise systems, technology platforms, and operational tools.
- Ability to analyze information, solve problems, and exercise sound judgment and decision-making.
- Ability to maintain confidentiality and handle sensitive information with discretion.
- Ability to compile, audit, verify, and organize information accurately.

- Ability to work independently and collaboratively while contributing to process improvements and operational efficiency.
- Willingness to learn, grow, receive constructive feedback, and adapt to changing business needs.
- Ability to work cooperatively with others while maintaining a caring and service-oriented approach.

SUPERVISORY RESPONSIBILITIES AND INTERACTIONS WITH OTHERS

This position has no direct supervisory responsibilities. The Client Service Associate will interact regularly with Financial Advisors, clients, co-workers, and third-party service providers.

EDUCATION, TRAINING, AND EXPERIENCE

- A high school diploma or general education degree (GED) is required.
- Associate degree or equivalent experience of two years is preferred.

PHYSICAL DEMANDS

PHYSICAL TASK	PHYSICAL REQUIREMENTS	FREQUENCY
Sitting	Must be able to remain in a stationary position for long periods of time.	Constantly
Standing	Must be able to remain in a vertical or upright position for long periods of time.	Occasionally
Walking	Must be able to move about the work area, from one area to another to perform work duties.	Occasionally
Lifting	Must be able to raise supplies and/or documents from a lower to a higher position or horizontally from position to position.	Occasionally
Reaching	Must be able to extend upper or lower extremities in an upward or downward direction to perform work tasks or other specific functions.	Occasionally
Handling	Must be able to operate a computer and handle documents.	Constantly
Grasping	Must be able to apply pressure to hold an object and to complete work duties.	Frequently
Seeing	Must have visual acuity to make observations and work on a computer for long periods of time.	Constantly
Talking	Must be able to communicate verbally with co-workers and customers to exchange information, respond to questions, and solve problems.	Frequently
Hearing	Must be able to receive information through oral communication to obtain information and assist in problem-solving.	Frequently

WORKING CONDITIONS

Duties are typically performed in an office environment. The work environment is usually a well-lighted environmentally controlled indoor environment with a moderate level of noise. This is a full-time position, and hours of work and days are Monday through Friday, 8:00 a.m. to 5:00 p.m. Work hours may vary depending on the operational activities and required duties; evening and weekend work may be occasionally required.

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this job. We are an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, protected veteran status or any other legally protected characteristics.

This job description is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible job responsibilities, tasks, and duties. The responsibilities, tasks, and duties may differ from those outlined in the job description and other duties, as assigned, may be required. This document does not create an employment contract. Employees are employed on an “at-will” basis and may be terminated at any time. Consistent with all federal and state disability laws, Branson Bank will provide reasonable accommodation when requested by a qualified applicant or employee with a disability, unless such accommodation would cause a direct threat to this individual or others in the workplace and the threat cannot be eliminated by reasonable accommodation or cause undue hardship to the organization. Branson Bank provides equal employment opportunities to all applicants.

By signing below, I acknowledge that I have read and understand this job description.

Employee Signature

Date