

CLIENT SERVICES MANAGER

About us

CAV_OK Family Office is a boutique family office with a holistic approach. We help ultra-high net worth families navigate their financial lives and achieve their vision of success. We are focused on clients' financial strategy, planning, and project execution – so they can focus on their families, businesses, and other passions.

About the job

Our Client Services Manager will play an important role in internal project and process management as well as external client and business partner relationship management. This role will help structure and maintain communications, processes, and activities that support business goals. This role is responsible for administrative efficiency and operational transactions.

Key Responsibilities and Duties

- Drives best practices and improves client outcomes through operational and administrative excellence
- Serves as primary administrative point of contact
- Maintains effective project and process management routines for operational activities
- Deepens relationships with business partners and the CAV_OK team
- Identifies and solves problems for clients and the business

Does this sound like you?

- Loves working a list
- Excels in written and verbal communications to clients and business partners
- Detail- and process-oriented
- Organizes and improves work systems
- Effectively prioritizes and drives projects and tasks to completion

Skills

- Communication, Organization, Problem Solving, Relationship Management, Task Management, Microsoft Office Suite (Outlook, Word, Excel, PowerPoint, OneNote)

Character

- Integrity, Kindness, Respect, Patience, Discipline, Timeliness

Required

Bachelor's degree

5+ years work experience

Preferred

Financial services experience

About arrangements and compensation

Compensation

Base pay range: \$60,000/year - \$80,000/year

Actual base salary may vary based upon, but not limited to, relevant experience and time in role.

In addition to base pay, compensation package includes medical, dental, and 401(k) benefits.

Hybrid

Our primary office is in Davidson, NC. We are seeking local candidates in greater Charlotte. Hybrid arrangements of 2-3 days per week in office will be considered.

Part-Time or Full-Time

Professionals seeking part-time to full-time employment (25 - 40 hours/week) will be considered. Compensation will be adjusted accordingly.