BLBB Advisors
FINANCIAL GUIDANCE SINCE 1964℠

Client Service Administrator

Location: Montgomeryville, PA

Work Environment: In-office, collaborative team setting. Remote work opportunities as needed following onboarding.

BLBB Advisors is growing and seeking a **Client Service Administrator** to join our collaborative, high-performing team. This position plays a vital role in supporting both the client service and operational functions of the firm.

The role provides the opportunity for frequent, professional, and detail-oriented interactions with clients and internal stakeholders, often serving as a first point of contact. We are seeking someone with a proactive, forward-thinking mindset who thrives in a role that balances independent work with close team collaboration. While this position is ideal for someone with client service experience, we also welcome applicants with operational backgrounds—particularly those who enjoy working with data, systems, and processes.

Our team values flexibility, cross-training, and a willingness to pitch in across departments including operations, compliance, and client events.

Primary Responsibilities

- Deliver an excellent experience for new and existing clients, prospective clients, and business partners.
- Assist with daily non-investment-related client inquiries, money movement requests, and account maintenance across custodial platforms including Pershing, Fidelity, Schwab, and TradePMR. (Experience with any is a plus.)
- Monitor client portfolio activity and cash levels across portfolio accounting systems and custodians; identify and resolve discrepancies.
- Prepare, distribute, and submit new account paperwork, contracts, and transfer forms—both in hard copy and electronically (primarily via DocuSign).
- Record and track client communications, notes, and tasks within the firm's CRM system.
- Maintain strong risk awareness and support firm-wide compliance efforts, minimizing risk for clients, advisors, and the firm.
- Use the portfolio accounting system to assist Financial Advisors with generating reports and supporting clients with portal access.
- Support internal initiatives by contributing to projects and assisting with firm-wide activities, including occasional event participation.

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Required Knowledge, Skills, and Abilities

- Exceptional attention to detail and accuracy
- Strong written and verbal communication skills in both in-person and virtual settings
- Professional demeanor and a client-focused mindset; able to represent the firm's brand with confidence
- Familiarity with basic investment concepts and financial terminology
- Conceptual understanding of how CRM systems, portfolio accounting platforms, and custodial interfaces work
- Highly organized and task-oriented with excellent follow-up skills
- Proficiency in Microsoft Office Suite, especially Outlook and Excel
- Ability to handle confidential information with discretion and integrity

Preferred Experience (Not Required)

- Background in operational or back-office financial services roles
- Experience with any of the following systems:
  - Envestnet Tamarac
  - Pershing Advisor Solutions NetX360, Fidelity Wealthscape, Charles Schwab Advisor Center, TradePMR Fusion or similar software
  - SugarCRM or comparable Customer Relationship Management software
  - DocuSign or comparable electronic signature software

If interested, please submit a resume and short cover letter here;

www.BLBB.com/Careers