BLBB Advisors

Client Service Administrator

Full-Time | No Licenses or Certifications Required

BLBB Advisors is growing and seeking a Client Service Administrator to join our collaborative, high-performing team. This position plays a vital role in delivering an exceptional client experience and supporting the financial advisors who serve our clients every day.

The role offers 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.

This is a dynamic, firm-wide role. Unlike positions dedicated to a single advisor team, this CSA will work across a broader set of financial advisor relationships and serve as a key resource for the full client service team—including providing coverage during vacations, absences, and busy periods. Our team values flexibility, cross-training, and a willingness to pitch in across departments including compliance and client events.

Primary Responsibilities

- Deliver an excellent experience for new and existing clients, prospective clients, and business partners.
- Support client service needs across multiple financial advisor relationships, providing consistent and professional service firm-wide.
- Serve as first-line coverage for the client service team when colleagues are on vacation, out sick, or otherwise unavailable—stepping in to manage daily workflows.
- 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 account activity and cash levels across portfolio accounting systems and custodians; identify and resolve discrepancies.
- Coordinate prospect and client meetings, including appointment preparation, greeting clients, and necessary follow-up.
- 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.
- Assist with distribution of quarterly portfolio and billing statements.
- Provide front-desk and receptionist coverage as needed.
- Support internal initiatives by contributing to firm-wide projects and activities, including occasional event participation.

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
- Adaptable and comfortable managing competing priorities across multiple advisor relationships
- Familiarity with basic investment concepts, account types, and financial terminology
- 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)

The following backgrounds and knowledge areas are a plus, but we are happy to train the right candidate:

- Familiarity with IRA distribution rules, including required minimum distributions (RMDs) and the rules governing inherited IRAs
- Experience supporting account and relationship transitions related to significant life events, such as changes in estate status or beneficiary updates—understanding that these transitions follow specific regulatory and custodial procedures and require careful, compassionate handling
- Experience with any of the following systems: Envestnet Tamarac, Pershing Advisor Solutions NetX360, Fidelity Wealthscape, Charles Schwab Advisor Center, TradePMR Fusion, or similar portfolio accounting or custodial software
- SugarCRM or comparable Customer Relationship Management software
- DocuSign or comparable electronic signature software

Job Type

Full-time | In-office preferred

Benefits

- 401(k) with 10% Match
- Health insurance and health savings account
- Life insurance
- Flexible paid time off, including work from home opportunities

Experience

- Financial services: 2 years (Required)

www.BLBB.com
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