JOB TITLE: Client Service Manager

LOCATION: Remote

Hemington is hiring a Client Service Manager with 1-5 years of experience who will play an integral role in supporting a rapidly growing team. This highly organized professional will be a key participant in the firm's operations by leveraging technology, internal resources, and custodial relationships. Our ideal hire is very detail-oriented, naturally curious and caring, and committed to providing an exceptional experience for Hemington clients.

WHO WE ARE:

Hemington Wealth Management is a boutique, high-end planning firm that is headquartered in Fall Church, VA, with seventeen professionals firmwide and a Chicago location. Our mission is to change outcomes for our clients. It is not just about presenting the best investment recommendations and optimizing all the various pieces of our clients' financial plans. We act as a Personal CFO for our clients and create space in meetings for clients to feel supported, understood, and excited about making their "Hemington" come true. Hemington's Chicago client base has grown exponentially over the past five years, in part due to our expertise and niche focus on serving Breadwinner Women Lawyers.

Our approach is truly collaborative, and our values are the foundation of decision-making and actions: People First, Better Together, Integrity Always, and Commitment to Excellence.

WHO YOU ARE:

- ✓ You **love** a list and take great pride in how detailed and organized you are!
- ✓ You thrive in a fast-paced firm that is blessed with an abundance of new clients; helping onboard and transition new clients is one of your favorite parts of the job.
- ✓ You hold yourself to very high standards of excellence, enjoy proactively running with things and problem-solving without being told exactly what to do, and your work ethic has always served you well.

- ✓ You enjoy data mining and getting the details right as much as you love helping others.
- ✓ You look forward to collaborating with a team of experts who really care about making their clients' lives easier.
- ✓ You are confident in your ability to provide a fantastic client experience. You cultivate close client relationships by being responsive and attentive to details, and constantly exceed client expectations.
- ✓ You exude positivity, patience, and empathy. Willing to listen to and connect with clients to ensure they feel known by Hemington. Communicate clearly and respond to emails within 1 business day or less.
- ✓ You perpetuate consistency and accuracy using various tools. Use Salesforce to carry out workflows and communicate with team to ensure nothing is missed. Set up and maintain accounts, move money, send gifts, ensure compliance requirements are met. Log all client activities in Salesforce. Maintain data accuracy in Salesforce and custodial platforms (we use Veo and Schwab). Troubleshoot team efficiency issues and client experience issues and recommend fixes. Follow all compliance rules, using workflows and tasks as instructed.
- ✓ Your teammates are deeply important to you; you feel lucky they are so focused on helping you develop in your role to become successful.

HIGHLIGHTS OF THE ROLE

- Competitive compensation commensurate with skills and experience
- Generous 401(k) profit-sharing
- Quarterly team and net new bonus opportunities
- Flexible working policies
- Professional development support & budget
- Company-paid health insurance
- Summer Jumpstart Fridays
- Paid 5-week Sabbatical every 5 years

For more information, please contact:
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