

Client Service Associate (Part-Time)

FPFoCo

375 E. Horsetooth Rd

Bldg. 3. Ste. 203

Fort Collins, CO 80525

About This Position

Our newest position is for a part-time Client Service Associate (CSA) with full-time benefits. You'll thrive in a highly collaborative, dynamic environment in this ensemble role, which will focus on assisting on both the operations and client service sides of our practice. Unique to this position is a requirement to be on-site in our Fort Collins office, where you'll serve as our "front of house" Monday through Friday from 10 a.m. to 2 p.m. Mountain time.

- Do what you enjoy and enjoy what you do in our lifestyle enterprise.
- Work comfortably from our local office.
- Find work-life balance at our modern financial planning practice.

About Our Firm

At FPFoCo, we are a fee-only financial planning firm and Your Full-Time Fiduciary®. We excel at working with successful singles, couples, and families who want a team to deliver comprehensive financial planning through personalized communication and consultations. Combining decades of experience with industry-leading certifications, we meet the highest standards of care, security, and uncompromising service. Our clients find us through referrals and online searches, and we do not sell investment, insurance, or any other financial products.



Role and Responsibilities

As a small four-person ensemble (soon to be five!), we all wear many hats. Each member of the team contributes to “onstage” client-facing activities as well as “backstage” operations responsibilities.

- Be the welcoming presence at our Fort Collins office.
- Support our Financial Planning Specialist in a data entry capacity as they develop our clients’ financial plans, addressing cash flow, equity compensation and other employee benefits, estate, insurance, investment, and tax planning.
- Assist our Director of Operations with the timely and accurate delivery of client-service-related work items across multiple platforms and custodians.
- Support your colleagues by maintaining a tidy and well-appointed office space, taking ownership of the aesthetic and vibe it conveys.
- Complete other duties as required.

Qualifications, Education, Skills

The following competencies will give you a head start in our vetting process.

- 1-3 years of experience working in a financial services-related position with some customer service responsibilities
- Willingness to be in-office while working, sometimes individually
- Self-driven and self-starting
- Strong and adaptive interpersonal communication skills (including in-person, chat, email, phone, remote meeting, and text message)
- Highly proficient technology skills
- Ability to remain discreet and maintain confidentiality
- Skilled at adjusting to changing priorities and sticking to deadlines

Our Tech Stack

You will use the following apps and tools, and we will train you if you’re right for the role. Bonus points if you’re already familiar with any of the stuff below!

- Betterment Advisor Solutions, Canopy, Charles Schwab, DocuSign, Estate Guru, Google Workspace, Holisitplan, Income Lab, Intuit ProConnect, Orion, QuickBooks Online, RightCapital, RingCentral, Salesforce, Social Security Timing, Wealthscape, Zapier, and Zoom.
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Compensation

This is a part-time (20 hours per week) hourly (W-2) position eligible for *all* of our listed benefits.

Hourly Cash Compensation

- \$28 - \$32/hr *plus* quarterly bonus of up to 20%

Benefits

- 401(k) with 100% match up to 5%
 - Health, Dental, and Vision insurance
 - In our small group plan, FPFoCo covers 100% of premiums for employees and 33% for spouse or domestic partner and/or dependant(s)
 - Health savings account (HSA) contributions through payroll deduction also available
 - Short- and long-term disability insurance
 - Available through NAPFA as a member employee
 - Life insurance
 - Available through NAPFA as a member employee
 - Paid holidays and paid time off (that we actually encourage you to use)
 - MacBook Pro + AirPods Pro
 - Professional certification/education reimbursement (up to 100% of costs, with prior approval)
 - Annual team retreat: A team building and strategic planning event in a fun location chosen by our team (that means you, too!)
 - Professional development: Love networking and attending industry events? We'll send you to up to one conference in the contiguous U.S. each year (all expenses paid, with prior approval)
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To apply, send your cover letter, resume, and optional video to us at hello@fpfoco.com. We are currently accepting applications for this position.