LeConte Wealth Management
Principled Counsel for Focused Investors

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Client Concierge Job Description

LeConte Wealth Management, LLC - Client Concierge

LeConte Wealth Management, LLC is a Registered Investment Advisory Firm (RIA) in Maryville, TN with over $210 million in client assets with 205 households looks to recruit a service associate to assist us in supporting our growing wealth management business. The Client Concierge role is essential to the success of LeConte Wealth Management as it is the ongoing face of our organization and defines the client experience. This role requires strong communication and organizational skills and the ability to build strong relationships with clients and other team members. We are a quickly growing team and we are looking for dynamic, friendly, and energetic associates to help facilitate our growth through providing the service our clients deserve.

Responsibilities

- Greet clients and visitors with welcoming personality
- Manage onboarding of new clients through account creation, asset transfer, and establishing client technology access.
- Manage the tax return delivery process for LeConte clients
- Build and maintain client relationships by providing the primary point of contact for service, preparing portfolio reviews, and scheduling client activities.
- Maintain client files and electronic records
- Assist in other administrative duties as needed

Qualifications

- High school diploma required
- Bachelor’s degree preferred
- Proficiency with MS Office Suite (Microsoft Teams a plus)
- Understanding and proficiency in paperless office functions (DocuSign, mobile check deposit, PDF writer)
- Strong verbal and written communication skills
- Desire to work in a team environment
- Broker dealer and / or advisory industry knowledge a plus but not required.

Benefits

At LeConte Wealth Management we provide a culture that supports success. In addition to a competitive pay package, we provide a 401k with an employer match, medical insurance, and paid time off. Our culture is that of collaboration, recognition, and team member development.

Please send resumes to Kevin Painter at kevin@lecontewealth.com