

Client Service Specialist

You will join our Client Services team, which manages all frontline communications with clients. This includes all incoming questions, requests and support matters— whether they come via our website, applications, live chat or email; and helping guide new clients through opening and funding their account.

The role – what you'll do:

- Deliver exceptional client service and customer support experiences through email, live chat, social media channels, and over the phone
- Communicate the benefits of our product to prospective clients
- Guide new clients through the onboarding process, answering all of their questions and helping them open and fund their account quickly
- Help clients use our product by explaining how certain features or processes work, including the requirements and timeline to complete various actions (like initiating a new investment or resetting 2FA)
- Ensure client requests and support matters are resolved in a timely manner
- Troubleshoot client issues and concerns, investigating why they happened, and coordinating with multiple other teams to identify and implement resolutions
- Act as the internal voice of the customer, offering insights to all areas of the customer experience across the business to help us build a better product

What we're looking for:

- Expertise with customer service, financial services, or retail banking
- Interest in becoming a subject matter expert in personal finance, alternative asset investing, and retirement accounts [i.e. IRAs and 401(k)s]
- Technical savvy, specifically the ability to navigate multiple complex systems and simultaneously to respond to customer inquiries
- Exceptional written communication skills and the ability to build rapport - you will speak with our customers through email and in real-time over our live chat feature, and in some situations, over the phone
- Someone with the flexibility to work overtime as needed
- Customer service, call center or related experience working with CRM and ticketing systems (e.g. HubSpot, Salesforce, ZenDesk, etc.)

The ideal candidate:

- Interpersonal communication and conflict resolution are two of your greatest strengths
- You effectively multitask, prioritize and manage your time
- You are goal-oriented and committed to continuous improvement (1% better every day)
- You work great on teams, yet are also an independent and strong individual contributor

- You are motivated by making clients happy and delivering incredible service
- You are proficient with PCs and other office equipment
- You are quick to learn and master new software – this is critical as we work with some specialized and proprietary applications
- You are familiar with customer care techniques and have a knack for de-escalating tense situations
- You are confident troubleshooting, problem solving and resolving client complaints
- You enjoy working in a fast-paced, collaborative environment
- You want to join a fast-growing company at an incredibly exciting time 🤖