



Client Service Director

Purpose of the Role

The Client Service Director is the operational backbone of the client experience at Tailored Wealth, responsible for helping new clients move from signed agreement to fully implemented relationship. This role owns onboarding, account setup, transfers, money movement, documentation, and ongoing service requests with a high level of accuracy, urgency, and care. Working closely with the Client Advisor, this person ensures recommendations are implemented smoothly and clients experience a clear, organized, and professional process from day one.

Key Responsibilities

- **Client Onboarding & Implementation**
 - Own the onboarding experience for new clients from signed agreement through account opening, funding, and implementation.
 - Gather required information and documentation, prepare and submit forms, and keep onboarding moving efficiently and accurately.
 - Coordinate account setup, transfers, rollovers, and money movement requests through completion while keeping clients informed of next steps.
- **Client Service & Account Maintenance**
 - Support clients with ongoing service requests including distributions, beneficiary updates, standing instructions, cash movements, and account maintenance items.
 - Serve as a responsive point of contact for operational and service-related needs, following through on open items with urgency and professionalism.
 - Coordinate with custodians and outside providers as needed to resolve issues and complete service requests accurately.
- **Process Execution & Operational Excellence**
 - Follow Tailored Wealth's service and operational workflows consistently while maintaining clean, timely, and accurate client records.
 - Track tasks, deadlines, and status updates so nothing falls through the cracks and clients receive a smooth experience.
- **Advisor & Team Support**
 - Partner closely with Client Advisors to ensure recommendations are implemented smoothly and clients experience a seamless handoff between planning and execution.

- Support meeting preparation and follow-up when needed, and reach out to clients by phone or email to gather details required for implementation and service work.
- Bring an entrepreneurial mindset, a willingness to learn, and a desire to help strengthen the client service function as Tailored Wealth scales.

- **Growth Opportunity**

- This role is designed for a strong executor today with the potential to grow into broader leadership within client service and operations over time.
- Success in the role means faster onboarding, stronger follow-through, and a more consistent service experience for clients and advisors alike.

- **Compliance**

- Handle sensitive client information with discretion and care while adhering to all firm policies, compliance requirements, and operational standards.
- Consistently act in a way that reflects Tailored Wealth's commitment to trust, excellence, responsiveness, and a high-quality client experience.

- **Professional Profile**

- Strong organization, attention to detail, and follow-through.
- Excellent written and verbal communication skills, with the ability to manage multiple workflows and deadlines at once.

Performance Measurement

Performance will be measured through Quarterly Performance Alignment Sessions, focusing on both quantitative results and qualitative contributions.

Top Key Performance Indicators (KPIs)

- Client Onboarding Speed – Move new clients efficiently from signed agreement to completed account setup and funding.
- New Account Setup Accuracy – Minimize errors, rework, and incomplete paperwork.
- Transfer & Money Movement Execution – Ensure transfers and operational requests are submitted and completed in a timely manner.
- Open Service Item Timeliness – Keep client service requests moving and close items promptly.
- Client Experience During Onboarding – Deliver a smooth, organized, and professional first impression for new clients.
- Technology Utilization – Maintain timely task completion, documentation, and workflow updates within firm systems.

Qualitative Success Factors

- Clear, proactive, and professional communication with clients.
- Strong attention to detail and ownership of follow-through.
- Ability to stay organized and calm while managing multiple moving parts.

- Commitment to improving processes, not just completing tasks.
- Strong partnership with Client Advisors and contribution to firm culture.

Closing

The Client Service Director role is essential to delivering an exceptional client experience and helping Tailored Wealth scale with consistency. This position is designed for someone who wants to make an immediate impact through strong execution today while helping shape a stronger client service function for the future.