

Richardson Financial Group, Inc.
Client Service Administrator/Operations Specialist
Position Description
April 22, 2026

Introduction

Richardson Financial Group is a rapidly growing boutique wealth management firm. We provide comprehensive planning that encompasses retirement planning, income tax planning, estate planning, insurance planning and investment management. Our customized strategies are designed to help protect and grow wealth by delivering an unprecedented level of expertise and personalized service.

We have a full-time in-office opportunity for an ideal candidate to join our firm as a Client Service Administrator/Operations Specialist. The position requires a blend of communication and organizational skills, strong computer skills and prior experience in the financial services industry.

We offer an energetic, fast paced, and fun office environment. We are honored to have been named a top ranked company in the Milwaukee Business Journal's best places to work micro category for the past several years.

Position Summary

The **Client Service Administrator/Operations Specialist** role is a hybrid position that works closely with both the client service team and the operations team. You will support all aspects of client servicing—including onboarding new clients and ongoing maintenance.

This dynamic, client-driven position requires strong organizational skills, significant attention to detail, and excellent communication skills. You will thrive in a team environment, enjoy continuous interaction with team members and clients, and bring high energy and enthusiasm to the role.

We serve a select group of successful families and our services are more sophisticated and complex than those offered by typical volume-based firms. This creates a work environment rich in variety, complexity, and responsibility. We are a smaller, nimble, tight-knit team that treats each other like family, with zero tolerance for office politics. If you are tired of “corporate America” and want to make a real difference in a respectful, appreciative setting, this is the opportunity for you.

Duties and Responsibilities

Client Service Responsibilities:

- Serve as the initial point of contact with clients and vendors via answering incoming phone calls and greeting visitors.
- Onboarding new wealth management clients:
 - Coordinate the process of opening new investment accounts including the compilation and completion of client, custodian, and firm paperwork.
 - Coordinate transfers of assets and funding of accounts.
 - Format new accounts across all systems (internal, custodian, reporting software, etc.).
 - Assist clients with establishing Richardson web portal and Charles Schwab web access.
- Ongoing wealth management client servicing:
 - Resolve issues and serve as liaison between advisor and clients as needed.
 - Manage cash disbursements from and deposits into client accounts.
 - Coordinate address, email, phone number and beneficiary changes.
 - Manage and maintain client information in our CRM.

Office and Administrative Responsibilities:

- Serve as the office administrator who is responsible for office operations and the office facility. Responsibilities include (but are not limited to):
 - Coordinate contract management and invoice management/payment with vendors.
 - Manage building maintenance with vendors.
 - Coordinate mail/UPS receipt and delivery.
 - Monitor and maintain office supplies.
 - Coordinate the acquisition, delivery and management of client gifts.
 - Coordinate client marketing events (procure site, deliverables, etc.)
- Serve as a member of the investment operations team. Responsibilities include (but are not limited to):
 - Assist with client communications including the delivery of email blasts, newsletters, and the printing and mailing of quarterly investment reports.
 - Assist with the delivery and receipt of documents with clients including scanning/saving documents to client files.
 - Preparation of various internal reports.
 - Distributing tax forms to clients (Form 1099s and K-1s).

Qualifications

The Client Service Administrator position requires the following qualifications:

- 2+ years' experience in the financial services industry.
- Organized, detail-oriented, and able to multitask.
- Exceptional relationship management skills.
- Strong analytical skills.
- Excellent written and verbal communication skills.
- Team player, collaborative, able to work with and through others.
- Prior experience working with Schwab Institutional is preferred but not required.
- Proficiency in Microsoft suite and DocuSign.
- Desire/ability to work successfully in a small company environment.

Benefits & Salary

Richardson Financial Group offers a comprehensive benefit package including medical, dental, disability and life insurance, Flexible Spending Account/Cafeteria Plan, SIMPLE IRA retirement plan and a Personal Time Off ("PTO") program that provides 20 days of paid time off annually. Compensation includes a competitive salary along with the opportunity for meaningful bonuses and profit participation.

Summary

We are an established boutique wealth management firm with a strong and expanding client base, solid reputation, state of the art facility in Menomonee Falls and a talented management team. We have a unique opportunity for a motivated individual with prior investment client service experience. If you are interested in becoming a vital member of a tight knit team that provides sophisticated services to successful families, then we should connect. Please submit your resume to mary@richardson-financial.com.