Client Service Associate

Starboard Advisors · Portland, Maine · Full-Time

About Starboard Advisors

Starboard Advisors is a division of a SEC-registered, independent Registered Investment Advisor (RIA) and headquartered in Portland, Maine. We serve a select group of high-net-worth families across North America, functioning as a dedicated family office with a single point of accountability for every dimension of their financial lives investment management, financial planning, estate and trust strategy, and multi-generational wealth governance.

We are a small, high-performing team that operates with a fiduciary-first mindset. We hold ourselves to the highest standard of objectivity, transparency, and care. Every client relationship we build is long-term, value-driven, and deeply personal. If you share those values, this role was built for you.

The Opportunity

We are seeking a professional to join our team as a Full-Time Client Service Associate, with the potential to develop into a Financial Planner position. You will work across all functions of the firm and develop genuine relationships with client families.

The ideal candidate is ambitious, service-oriented, and excited by the idea of wearing many hats in a small, collaborative environment. You must be organized, thoughtful, and genuinely motivated by helping people. Training will be provided as needed across the board.

Core Responsibilities

Administrative Support

- Answering phone calls
- Ordering and maintaining office supplies
- Event planning
- Booking business travel
- Coordinate and Maintain marketing materials and communications

Client Relations & Back Office Operations

- Execute and manage custodial operations across Fidelity and Schwab platforms
- Process: account openings; monetary transfers & distributions; account maintenance requests
- Reconcile portfolios and ensure accuracy of client account data
- Prepare client reporting packages and performance summaries

- Coordinate with clients, attorneys, accountants, and other advisors
- Prepare meeting agendas, presentation materials, and follow-up action items
- Support the development of proposals and client-facing materials

Technology & Systems

- Develop proficiency in core platform suites: Tamarac (portfolio management & reporting), Salesforce (CRM), eMoney (financial planning), and RedBlack (trading)
- Support financial planning preparation and updates in eMoney
- Explore and develop AI-enabled workflows across operations, planning, and communications to improve firm efficiency and client experience
- Maintain CRM data integrity and client records in Salesforce

Qualifications

Required

- Bachelor's degree (finance, economics, business, or related field preferred)
- Strong command of Microsoft Office Suite (Word, Excel, PowerPoint, Outlook)
- Exceptional attention to detail and organizational skills
- Outstanding written and verbal communication skills
- Genuine service orientation — you are energized by helping others
- Comfort in a fast-paced, small-team environment with evolving responsibilities

Preferred

- Prior internship or experience in financial services, wealth management, or RIA operations
- Familiarity with Fidelity, Schwab, or other custodial platforms
- Exposure to financial planning or CRM software
- Demonstrated interest in personal finance, investing, or financial planning
- Early experience with or curiosity about AI tools and workflow automation

Compensation & Benefits

- Competitive base salary
- Business development incentive: performance-based compensation for client relationships you source and convert
- CFP® Certification support: Starboard will subsidize examination fees, study materials, and education requirements to support your path to CFP® designation
- 3 weeks paid vacation
- Mentorship from experienced advisors with deep industry tenure
- Opportunity to grow within a firm where your contributions are visible and valued

Schedule & Expectation

- Full-time position: Monday-Friday (onsite in Portland, ME)
- Minimal travel required for client meetings and business development

Who Thrives Here

- **A service heart** — you find meaning in making someone's life easier and their financial future more secure
- **A fiduciary mindset** — you understand that clients' interests always come first, without exception
- **Intellectual curiosity** — you want to understand the "why" behind every recommendation
- **Ambition with humility** — you want to grow quickly but are willing to do the foundational work
- **A forward-thinking perspective on technology** — you see AI not as a threat, but as a tool to serve clients better

This is a small team. You will be known, relied upon, and given real responsibility from day one. There is no hiding, and there is no ceiling.

How to Apply

Please submit a resume and a brief cover letter to Careers@starboardadvisor.com. In your cover letter, tell us why wealth management, and why Starboard. We read everything.