

## Client Engagement Associate

### Location:

**Job Type:** Full-time

**Reports to:** Client Engagement Associate

---

### About Balefire

At Balefire, we're redefining what it means to be a financial advisory firm. We believe the future of wealth management is collaborative, innovative, and deeply personal—and we're building a team that reflects that vision. With a culture centered on trust, shared success, and bold ideas, Balefire empowers employees to make an impact while growing their careers. We're united by a mission to serve clients with integrity and purpose, creating solutions that last for generations. If you're energized by meaningful work, collaborative teams, and continuous learning, Balefire offers a dynamic environment where you can thrive.

---

### Role Overview

As a Client Engagement Associate, you'll be a key member of the Balefire team, helping deliver exceptional service to our clients every day. This role is ideal for someone who thrives in a fast-paced environment, enjoys building relationships, and takes pride in precision and follow-through. You'll work closely with advisors, clients, and internal teams to ensure seamless client experiences, manage important account processes, and uphold the high standards that define Balefire.

---

### Key Responsibilities

- Serve as a primary point of contact for client inquiries, providing responsive and professional support.
  - Process account paperwork, fund transfers, and service requests accurately and efficiently.
  - Coordinate workflows between advisors, custodians, and internal teams.
  - Monitor and resolve account alerts and service escalations in a timely manner.
  - Maintain accurate client records in CRM systems (Practifi/Salesforce).
  - Support compliance processes and uphold regulatory standards.
  - Contribute to internal projects that improve service quality and operational efficiency.
- 

### Qualifications

- 3–5 years of experience in financial services, legal, or consulting environments.
  - Excellent written and verbal communication skills.
  - Strong organizational skills and attention to detail.
  - Proficiency with CRM systems (Salesforce, HubSpot, or Practifi preferred).
  - Problem-solving mindset with a proactive, team-oriented approach.
  - Professionalism and a commitment to client service excellence.
- 

### Compensation & Benefits

Balefire offers a competitive compensation package designed to support your professional and personal well-being. We provide a combination of base salary and performance-based incentives, along with a robust benefits program that includes:

- Medical, dental, and vision coverage
- Retirement savings plan with company contributions
- Health savings and wellness programs
- Flexible paid time off and holidays
- Opportunities for professional development and continuing education
- A collaborative, people-centered work environment

Specific compensation details will be discussed during the interview process.

---

### Work Schedule

- Monday through Friday, 8:00 AM – 5:00 PM
  - In-office position
- 

### Join Our Team

If you're excited to be part of a growing firm where your contributions make a difference, we'd love to hear from you. Bring your talents to Balefire and help us create a better client experience—together.