



**Posting Date 2.24.25**

**Job Title: Client Service Associate**

**Company:** Klaas Financial

**Location:** Madison, WI

**Position Type:** Full-Time

**Pay Range:** \$48,000 - \$55,000 (exclusive of bonuses and benefits)

### **Who Are We?**

Klaas Financial is **THE PLACE** to be! Since 1976, we've been helping clients plan for and enjoy their dream retirement. We've got an **amazing "Klaas Krew"**, a **great working** culture, and some of the best clients you'll ever meet! We work as a team (we know, that's rare in financial planning) – **celebrating wins together, hearing about our client's success stories and making a real impact in people's lives** every single day.

Our clients and our Krew are the heart of what we do (hey, that rhymes)! We believe in working hard, supporting each other, and having a little fun along the way. Plus, our benefits package is **top-notch**, our doors are always open, and if you're the right fit, we're **YOUR new Krew!**

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### **What Do We Need?**

We're looking for a **high-energy, detail-obsessed, client-focused rockstar** who thrives on making things happen! Someone who:

- ✓ **Loves organization** and efficiency (we mean **really** loves it!)
- ✓ Gets excited about **helping clients** and solving problems
- ✓ Is a **great communicator** – both with people and paperwork
- ✓ Has **integrity, ethics, and a strong work ethic** (non-negotiable)
- ✓ Enjoys **learning and growing** (this is a career, not just a job!)

Financial industry experience? **Great!** No experience but you're eager to learn? **Even better!** We'll provide the training – just bring a **positive attitude, a love for clients, and a drive to succeed.**

## What's in It for You?


- ✓ **A fast-paced, people-first role** where no two days are the same
- ✓ **An incredible team** that supports each other and celebrates wins
- ✓ **Direct client interaction** – you'll be the friendly face clients rely on
- ✓ **Top-tier benefits** (health, 401(k) with match, PTO, and more!)
- ✓ **A workplace that values work-life balance**


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## What You'll Be Doing Every Day:

 **Client Support & Onboarding:** You'll be the **first point of contact** for clients, making sure their onboarding is seamless and their accounts are in tip-top shape.

 **Account Management:** Help with **trades, transfers, RMDs, and transactions** while keeping everything **organized and compliant**.

 **Client Communication:** You'll be answering client questions, keeping them informed, and making sure they have a **five-star experience** every time they reach out.

 **Problem-Solving & Process Improvement:** Have an idea to make things better? We're all ears! We love **innovators and team players**.

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## Ready to Join the Krew?

If you're still reading, we must have your attention – **so let's talk!** Send us your resume, and we'll send you all of the details and requirements for this position. If you're still excited after reading that (and haven't dozed off), then **let's connect!**