

# Client Service Administrator

## Vista Capital Partners

Vista Capital Partners is one of the leading financial advisors in the Pacific Northwest and has become a career destination. Our unique investment philosophy, standard-setting client services, career-pathing, and engaging work environment help to attract and retain top talent. Our core purpose is to build happier and more prosperous lives.

We believe a healthy work/life balance is essential—happy employees provide the best possible service to our clients. To elevate the employee experience, we engage in regular team-building exercises, provide time for employees to volunteer in the community, and offer periodic sabbaticals.

We are hiring a Client Service Administrator to join our talented team of financial service professionals.

### Job Summary

The Client Service Administrator functions as part of a three-person client service team administering, supporting, and coordinating the activities related to serving our clients. We are looking for an individual who works well in a team environment and can provide superior client service.

### Duties and Responsibilities

Client Service Administrator responsibilities include the following:

- Assist our clients in the administration of their accounts
- Coordinate and schedule client meetings
- Generate quarterly performance reports and statements
- Facilitate the setup of new clients
- Provide general office support
- Perform duties as assigned by the client service team

### Core Values

We will hire the person who best embodies and embraces Vista's core values:

- **Act with Integrity**

Successful relationships are built on trust.

- **Strive for Simplicity**

Keeping things simple allows us to focus on what truly matters.

- **Be Passionate**

An unwavering belief in what we're doing brings out the best in us. Passion inspires and is contagious.

- **Demand Excellence**

Our clients and colleagues deserve our best effort. Always.

- **Enjoy the Journey**

A fun and flexible work environment allows our people to enjoy happy and fulfilling lives.

## **Qualifications**

The Client Service Administrator position typically requires the following qualifications:

- Minimum of 3-5 years business experience, preferably in the financial services industry
- Proficient with computers and software packages, particularly Microsoft Word, Excel, PowerPoint and Outlook.

## **Salary and Benefits**

Pay and benefits are competitive based on industry standards:

- Salary based on experience
- Bonus
- Profit sharing
- Benefits include health care, paid time off, sabbaticals and 401(k)
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

## **How to Apply**

Interested applicants should send their resumes with a cover letter to: Tana Thomson, [tana@vistacp.com](mailto:tana@vistacp.com). Mailing address is:

Vista Capital Partners  
9755 S.W. Barnes Road, Suite 595  
Portland, OR 97225

We will contact you if we believe your qualifications meet our needs. Thank you!

**VISTA CAPITAL PARTNERS IS AN EQUAL OPPORTUNITY EMPLOYER**