versant
CAPITAL MANAGEMENT

We're Hiring: Client Service Associate

📍 Location: Dallas, TX

Ready to Deliver Exceptional Service?

Are you a detail-oriented professional who thrives in a fast-paced environment, enjoys supporting others, and takes pride in delivering an outstanding client experience? We're looking for a Client Service Associate (CSA) to join our Dallas office and play a key role in serving our high-net-worth and multi-generational family clients.

This role is ideal for someone who's proactive, organized, and eager to grow within a collaborative, high-performing financial team.

What We Do

Versant is a multi-family office serving high-net-worth individuals and multi-generational families with a holistic approach. Our services go beyond traditional wealth management—we integrate tax planning, estate and legacy planning, liquidity and exit planning, retirement planning, family governance and education, risk management, lifestyle/household concierge services, and more.

What You'll Do

As a Client Service Associate, you'll provide essential support to our wealth advisors and operations team, helping deliver a seamless client experience from onboarding through ongoing service. You'll make sure that every detail, from paperwork and reporting to communication and coordination, reflects Versant's commitment to excellence.

Key Responsibilities

Client Service Excellence

- Serve as the first point of contact for high-net-worth and ultra-high-net-worth clients, providing timely, professional, and personalized responses and service.
- Coordinate with wealth advisors and associates to prepare meeting materials, investment reports, financial statements, and follow-up summaries provided to clients.
- Support ongoing client activities, including document uploads, tax reporting coordination, beneficiary changes, gifting, and year-end tasks.

- Facilitate communication between clients and internal teams to make sure deadlines are met and expectations are exceeded.
- Understand the family dynamics and communication preferences of each client household.

Client Operations & Administrative Support

- Prepare, review, and submit account applications, transfers, distributions, and other custodial paperwork.
- Manage client onboarding workflows—gather documentation, coordinate signatures, set up client portals, and ensure internal systems are updated.
- Maintain accurate client records across CRM, reporting systems, and custodian platforms.
- Process daily operational items such as check deposits, ACAT transfers, journals, RMDs, margin requests, contributions, and distributions.
- Assist with quarterly reporting processes, including data validation and quality checks.

What We're Looking For

You'll thrive in this role if you're a dependable team player with exceptional organizational skills, a strong client-service mindset, and a stickler for detail.

Ideal Candidates Will Have:

- Bachelor's degree or equivalent experience in finance, business, or related field.
- 2+ years of experience in a client service or operations role within a financial services or RIA (registered investment advisory) environment.
- Strong organizational skills and attention to detail.
- Excellent written and verbal communication skills.
- Proficiency with Microsoft Office Suite; experience with CRM systems, performance reporting systems, and custodial platforms preferred.
- Ability to manage multiple priorities in a fast-paced, team-oriented environment.

Why Versant

We're more than a multi-family office; we're a team built on integrity, collaboration, and purpose. We empower both our clients and our people through a culture of trust, accountability, and growth.

What You Can Expect

- Competitive salary based on experience and qualifications
- Discretionary bonuses and incentive compensation
- Generous PTO and paid sick time
- Paid holidays

- Paid health, dental, and vision insurance
- Paid short- and long-term disability insurance
- Paid parental leave
- 401(k) and profit sharing
- Tuition reimbursement for professional development
- Matching gift charitable donation program
- Team retreats, professional events, and firm-sponsored outings

This Is More Than a Job; It's a Career with Purpose

If you're ready to contribute to a team that values excellence, precision, and genuine client care, we'd love to hear from you.

Next Steps

Apply by sending your resume and cover letter to connected@versantcm.com

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