

Cover Letter for Jason Roger: Client Service Associate Position

Dear Hiring Manager,

I am pleased to recommend Jason Roger for the position of Client Service Associate at your esteemed retirement and financial planning firm. Jason's professional background, as outlined in his CV, aligns strongly with your requirements and demonstrates his readiness to contribute meaningfully to your client service team.

Jason brings over five years of experience supporting executive-level operations in finance, logistics, and customer service environments. He has proven expertise in managing sensitive client inquiries, maintaining accurate records, and coordinating interdepartmental communications under tight deadlines. Notably, his recent role as a Client Service Associate at E*TRADE Financial involved acting as the main point of contact for high-value clients, managing complex financial requests, and collaborating with internal sales and investment teams to deliver exceptional client experiences.

In addition to his hands-on client service experience, Jason has demonstrated a strong work ethic and a positive, deadline-focused attitude throughout his career. His tenure as a PT Teller at Wells Fargo and as a Customer Service Support specialist at FedEx Freight further highlights his ability to handle confidential transactions, resolve escalated client issues, and maintain professionalism in high-pressure situations.

Jason's technical proficiency includes advanced skills in Microsoft Office Suite (Excel, Word, PowerPoint), Google Workspace, and various document management systems. While his CV does not explicitly mention Orion, Eclipse, Schwab, or CRM platforms, his adaptability and track record with similar tools suggest he will quickly become proficient with your firm's preferred systems. His typing speed and virtual meeting experience also ensure efficient communication and documentation.

Academically, Jason has completed significant coursework toward a Bachelor's degree in Finance, meeting your educational preference, and holds an Associate Degree as well. His background as a professional athlete in Major League Baseball attests to his discipline, resilience, and team-oriented mindset—qualities that translate well to the fast-paced, client-focused environment you describe.

Regards

Carola Blanco
Recruiter