

THE BELAY DIFFERENCE

All you need to know about BELAY's new Client Services Assistant.

Who is BELAY? Choosing a BELAY Client Services Assistant means choosing:

1 A U.S.-based, finance-fluent assistant ready to serve your clients exceptionally.

2 Managed service & ongoing support so that you find your perfect fit and keep it.

3 Highly vetted individuals. Only the top 3% of over 10,000 applicants become a BELAY Assistant.

4 Over 15 years of award-winning support to ensure your satisfaction.

What Can a BELAY CSA Offer?

A BELAY Client Services Assistant can manage countless tasks, including:

ADVISOR SUPPORT

- Inbox and calendar management
- Meeting scheduling, prep & follow-up
- Social media assistance
- Expense and invoice support
- Travel and itinerary coordination
- Open client accounts with advisor direction

CLIENT SERVICE

- Coordinate onboarding workflows
- Process service requests
- Manage client gifting
- Plan client events
- Prepare applications and forms
- Track signatures & approvals

CRM & RECORD KEEPING

- Update client records
- Maintain CRM workflows
- Run basic reports
- Project manage tasks and deliverables
- Organize sensitive documents
- Track missing documents

To learn more, check out [our resource on the difference between an Executive Assistant and a Client Services Assistant](#).

When you partner with BELAY, you're immediately matched with a Client Success Consultant who provides continuous support to ensure you and your CSA find success.

How Do I Get Started? Here's the BELAY process:

STEP 1

Hire BELAY.

Work with our team to identify your exact needs and determine the right hire for you. If BELAY is a good fit, we'll send you an agreement to sign, and you'll officially start our best-in-class placement process.

STEP 2

Get matched with the right Client Services Assistant for your needs.

Our team will select the best assistant for you from our bench of 2,000+ exceptional candidates. Most clients are matched in less than one week. Then, we'll guide you through our proven onboarding process.

STEP 3

Get back to the work that deserves you.

Stop being stretched thin, missing important information, and allowing chaos to keep you from serving your clients well. Do more of the work that moves your firm forward while your CSA handles the details.