Client Service Associate

Financial Services

Position Overview

If you are an experiencedClient Service Associateor someone that wants to begin a career in the financial services industry, we are a friendly, fast-paced wealth management firm in Saint Cloud where you can make an immediate contribution! We are energetic, collaborative and client service focused. Our clients always come first. We expect top performance and a can-do, committed attitude from all team members.

The main responsibilities of this position are toact as the first point of contact for all clients and vendors and to provide support to the overall business through administrative and marketing responsibilities. The successful candidate must be detailed and organized as well as possess strong clerical, communication, computer and customer service skills. They will also be a self-starter having strong initiative, strong attention to detail and excellent follow through skills. Previous financial services experience preferred.

An attractive compensation and benefits package awaits the successful candidate.

**Position Duties and Tasks**

* Answer telephone inquiries from clients:
* Deliver concierge service to clients in phone and in person, great conversationalist
* Ask questions and be able to articulate problems/issues to Advisor
* Handle calendar for Advisor including set up and confirmation of review meetings
* Set-up and maintain client management system
* Create client meeting portfolio summary
* Handle routine service matters for client accounts to include processing name and address changes, account applications, bank authorizations, beneficiary changes, etc.
* Service existing clients including processing retirement distribution, paperwork for changing investments, preparing for client reviews, etc.
* Provide marketing support for the office to include:
* Sending marketing brochures to clients and prospects at direction of Advisor
* Following up on referrals, leads, prospects or clients with letters or notes signed by Advisor
* Handling unsolicited calls from prospects to schedule appointments or refer to Advisor
* Assist in coordinating seminars or client appreciation events
* Ensure branch office meets the broker/dealer’s compliance requirements
	+ Record all transactions on appropriate logs and blotters
	+ Set up client files, both paper and electronic, correctly and obtain necessary information
	+ Track continuing education for licensed professionals
* General office responsibilities will include basic accounting, revenue tracking, mail management, tending to the lobby and client meeting areas, and decorating for holidays
* Assist with other duties and projects as assigned

**Position Requirements**

* 1+ years securities or related industry experience preferred or 3+ years administrative experience from other industries
* Must be a self-starter, able to take initiative and work with minimal supervision
* Strong attention to detail orientation, accuracy and completeness of all forms, letters, emails, etc.
* Ability to organize, prioritize and handle multiple tasks
* Ability to work under pressure, meet deadlines, and work cooperatively in a team environment
* Previous customer service experience preferred
* Ability to communicate with co-workers, clients, and various business contacts in a courteous and professional manner
* Skilled in strong and effective verbal and written communication
* Adept in Microsoft Word, Excel and familiarity with Client Relationship Management systems
* Ability to maintain confidentiality
* Have a proactive approach to client service and problem solving
* Ability to take complete and accurate notes

Please send resumes to akizer@talentlinksolutions.com.