Senior Client Relationship & Operations Specialist
Edina, MN

Due to external client contact, COVID-19 vaccination required and company will consider accommodation requests.

We are looking for a highly-dedicated, experienced Senior Client Relationship & Operations Specialist to join our team. This role ensures that the firm's client service and operational processes are working smoothly by systemizing processes and leveraging technology including our CRM system. This position will be the client service point of contact for complex client needs and will be the "go to" expert for other client service team members. They will have responsibility for billing and executing compliance tasks that require experience. This position will report to the COO, one of the firm's shareholders.

Growth Opportunity
Career Track: Over time, this position may lead to the following:
- Operations or Client Service Manager.
- Operations or Client Service Director
- Chief Operating Office or Chief Compliance Officer

Knowledge, Skills and Abilities:
- High initiative, drive, and dedication.
- Strong organizational and multi-tasking skills.
- Detail oriented with high attention to detail.
- Strong verbal/written skills.
- Team player.
- "Big picture" thinker and process oriented.
- Seeks efficiencies. Desires to make things better.
- Desire to learn and grow and to become expert in many areas.
- Leadership experience - management experience a plus.
- Strong working knowledge of computers, office software (word, excel) and CRM.

Education/Experience: Bachelor's degree from an accredited four-year college or university. 7+ years of wealth management/investment client service and operations experience.

Compensation
This is a key position for our firm, and we will compensate accordingly.

Base Salary: Based on skills and experience.
Bonuses: Based on team results.

Benefits
Individual and family health coverage.
Company-paid disability income and life insurance.
Company contribution to 401(k) plan after one year.
Day-time flexibility for personal needs.
Tuition reimbursement program.

Laurel Wealth Planning, LLC, (LWP) is an established holistic wealth management firm serving individual clients in Minnesota and several other states from our main office in Edina, Minnesota.

Our mission is to help our clients live the lives they want, fostering long-term relationships built on a foundation of trust and confidence. We believe in the value of comprehensive financial planning and proactive investment management. Our high attention to our clients is grounded in our values of client care first, honor, full reliability, going the extra mile, and win-win teamwork.

We have served the Twin Cities area and our market niches — including retirees, women decision makers, and affluent divorcees & widow(er)s — for more than 20 years. Our firm has grown more than 25% per year over the last two years, helping provide career opportunity to our team members. Our team is highly capable and collaborative. We work hard for our valued clients and also have fun together, including firm lunches and team building events.

For more details contact:

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