CLIENT SERVICES REPRESENTATIVE

Client Services Representatives will work closely with the Associate Advisors to deliver financial security to their clients through a comprehensive planning process that integrates risk and investment products. Client Services Representative help increase productivity by providing client servicing, integrated operations support, and direct assistance to Associate and Lead Advisors.

Specific responsibilities include but will not be limited to:

Advisor and Service Support

- Collect materials for preparation of client review meetings. This includes an agenda, existing plan, summary documents, and if applicable Morningstar or market analysis, current investment statements, performance reports and marketing materials.
- Collaborate with Advisors and other team members to deliver consistent servicing aligned with wealth management best practices for the firm's clients and prospects.
- Coordinate with Advisors to prioritize client scheduling. Call or email clients to schedule times for in-person and virtual meetings.
- Prepare all materials and information need to support insurance policy underwriting and investment account creation process.
- Process, or collaborate with others to complete insurance and investment service requests such as name and address changes, beneficiary changes, and updates to billing information to facilitate the collection of payments.
- Manage workflow to and from clients and Advisors. Track status of client activities through case notes, task creation, and opportunities in the Client Relationship Management system.

QUALIFICATIONS

Education and Industry Experience

Required

- Strong attention to detail, accuracy, and follow-through
- Strong analytical, problem solving, and written and verbal communication skills, with the ability to work well with others
- Ability to manage workflow and organize tasks

Additional Desired Skills

- Coachable, and passionate about learning and growing with the firm
- Self-aware and willing to be vulnerable
- Team player with a "we can do it!" mentality

Preferred (but not required)

- Life, Accident & Health Insurance licenses
- Bachelor's Degree in business, finance and/or related field
- 1-3 years financial planning, banking, or client servicing experience
- Series 7 or 6 & 63

CAREER GROWTH TRACK OPPORTUNITES

- Insurance Operations Specialist
- Investment Operations Specialist
- Associate Advisor