finivi UNLIMIT YOUR LIFE | Financial Advisors

Position Description – Client Services Specialist

We are currently interviewing for a Client Service Associate / Relationship Manager who will be responsible for providing proactive client service, and administrative support to the firm's financial advisors in all phases of client relationship management, new business processing, and client meeting preparation. Included in this role will be directly communicating with clients by phone, email, and through virtual meetings.

Qualifications:

- Exceptional analytical, oral, and written communication skills
- You are outgoing and comfortable on the telephone
- Extremely detail-oriented
- At ease in boutique office settings
- Passion for client services and delivering memorable experiences
- Tech-savvy. Comfortable using Screen Share programs such as Teams, Zoom, etc.
- Self-directed: able to multi-task, prioritize, and manage multiple requests
- Proficient knowledge of Microsoft Office Suite
- Understanding of financial markets, insurance, and investment products a plus
- BA/BS in Business or Finance preferred but not required
- 3+ years experience as an Administrative Assistant/Client Relationship Manager or similar role in a Financial Services setting preferred

Primary Responsibilities:

- Play a key role in building and maintaining deep, meaningful client relationships.
- Assist financial advisors with preparation for client meetings including collecting, organizing, and synthesizing client account and planning data.
- Manage all operational items as they relate to client accounts, including but not limited to preparing account paperwork, initiating service requests, and assisting clients with online account access.
- Respond to client inquiries, identify, research, and resolve service issues.
- Assist Financial Advisors with gathering and organizing client documents required for planning engagements, including assisting clients in connecting their outside financial accounts to the firm's online planning tool. (Experience with eMoney is a plus)
- Telephone clients to schedule in-person or virtual review meetings
- Create client reports using portfolio software programs
- Assist financial advisors with follow-up tasks from client meetings, including but not limited to meeting notes, completing planning or investment management tasks, and coordinating work with other team members.
- Perform other duties and projects as assigned.

How to Apply:

If you are interested in joining our team, apply online through our website www.finivi.com.