PARTNERS
IN FINANCIAL PLANNING

Client Services Associate Position Overview

This is an administrative position and you will work directly with existing firm clients as well as new clients. You will be the initial point of contact with clients and prospective clients. You will be responsible for preparing or obtaining documents required in opening and maintaining client investment accounts. You will be responsible for maintaining the client management system and for providing reports as required. Thorough computer skills are a must and superior knowledge of Microsoft Outlook, Word, and Excel is required. You must be comfortable with data entry and database management. Writing and communication skills must be excellent. Staff is available to provide mentoring and big picture direction but you must have the ability to utilize critical thinking skills and work independently.

How to Apply

Please send your resume and a cover letter outlining your salary requirements to sandy@partnersinfinancialplanning.com, or by mail to:

Sandy Jaeger
Partners in Financial Planning
421 S. College Ave.
Salem, VA 24153

Job Description

Partners in Financial Planning, LLC is a well established financial planning company that is expanding. We offer a great team environment, a reputation for excellence, established clients and excellent growth potential to help you reach your personal goals.

We feel our employees are as important as our clients, and we work to provide both with a great atmosphere and learning environment. We value our employees and we take pride in recognizing their outstanding talents and efforts. We are committed to the delivery of superior quality and service based on a foundation of honesty, integrity and ethical treatment.

Partners in Financial Planning and its owners have served southwest Virginia and surrounding areas since 2009. We specialize in wealth management services for physicians and other professionals. We provide high touch services designed to exceed the client’s expectations. We customize our services for each client, coordinating specific financial resources with goals, risk tolerance and lifestyle. We also specialize in tax planning, stock-option planning and investment planning, as well as comprehensive financial life planning. Our clients enjoy the peace of mind that comes from delegating their financial details and big-picture outlook to qualified, compassionate advisors. As a result, we have a business built on significant client referrals.

We are currently seeking a dedicated team player who is familiar with providing excellent client service and maintaining client records, and is dedicated to helping take our company to the next level. Our Administrative Services Specialist position requires a goal-oriented, self-motivated and professional person. All candidates should demonstrate a desire to network, build relationships and communicate effectively with people.

Initial Key Areas of Responsibilities:

- Demonstrate excellent people skills
- Serve as initial point of contact with clients and prospective clients
- Capture, organize and maintain client information
- Work with the client management system (Junxure)
- Work with various custodians on client account issues/maintenance
- Provide various reports as required
- Maintain a strong commitment to teamwork and contribute to the overall success of the company
- Use time effectively; prioritize urgent concerns and long-term needs
- Schedule and confirm client meetings
- Faxing, copying, scanning documents
- Prepare, coordinate and follow through on account applications and any other needed documents with new or existing clients
- Suggest ways to improve our work and the efficiency of our procedures

Future Expected Key Areas of Responsibilities:

- Demonstrate excellent professionalism by being confident in the delivery of services to clients.
- Manage client administration unsupervised
- Assist financial planners in delivery of services to clients.

Qualifications:

- B.A. or B.S. degree preferred
- Strong verbal and written communication skills
- Strong persuasive and interpersonal skills
- Demonstrated competence in Office software (Outlook, Excel, Word)
- Ability to identify, meet and follow through with client's needs and requirements
- Must be a self-starter and a problem solver
- Must be a goal-oriented team player
- Strong attention to detail
- Must demonstrate excellence in organizational and time management skills
- Able to perform multiple tasks efficiently
- Exceptional phone and client service skills, positive and upbeat attitude at all times
- Ability to pass a credit check and criminal background check

Benefits:

- Competitive salary (commensurate with experience)
- Career Track available with ability to share in profits
- Comprehensive Benefits Package
- Retirement plan with company match
- Paid vacation
- Educational reimbursement (continued education, conference attendance, training budget, etc.)
- Paid professional dues
- Mentorship and Learning Opportunities
- Great working environment with professional growth opportunities
- Paid Parking

Expectations of a Partners in Financial Planning employee

- ALWAYS honest/high integrity
- Dependable and on time
- Keeping a 'no job is beneath me attitude'
- Strict adherence to standards of confidentiality
- Conscientious and a self-starter
- High level of motivation, personal responsibility, dependability, and an inclination to act without waiting to be asked
- Cooperative team player - willing to put the goals and needs of the firm first ahead of their own
- Creative problem solver
- Always working to bring creative, new, and fresh ideas to the firm
- Balanced self-confidence
- Works independently under general guidance, but recognize their personal limitations, asks for help when needed, accepts constructive criticism
- Not afraid to make mistakes, but learns from these mistakes
- Always working on personal development growth, skills (communication and listening especially) and overall self-improvement
- No excuses, gets the job done
- Ability to think 'out of the box'
- Welcomes the opportunity to be challenged on a daily basis
- Represents themselves at work and away from work in a professional manner
- Doesn't need to be reminded or asked more than once
- Maintains a clean and professional dress and appearance
- Willing to question the status-quo

- Realizes the reason we get to do what we do is ONLY because of our clients; their needs, wants, and what is best for them always comes first - ahead of the firm and our own needs
- Understands that there is no short cut to any place worth going
- Has fun, passionate, and enjoys what they do

Partners in Financial Planning, LLC reserves the right to modify, interpret, or apply this job description in any way the Company desires. This job description in no way implies that these are the only duties, including essential duties, to be performed by the Employee occupying this position. This job description is not an employment contract, implied or otherwise. The employment relationship remains "at-will."