Position: Client Relationship Manager/Advisor Assistant

Critical features of this job are described under the headings below. They may be subject to change at any time due to reasonable accommodation or other reasons.

JOB SUMMARY:

The Client Relationship Manager/Advisor Assistant is responsible for a wide variety of office support duties. The CRM assists team members in preparing for client meetings and ensures aspects of client accounts are properly maintained. He or she must be an organized, efficient, and detail-oriented individual who can perform daily office tasks in a fast-growing and fast-paced environment. This person must have a passion for providing ongoing service and support to clients that exceeds expectations.

DUTIES AND RESPONSIBILITIES:

Specific duties include, but are not limited to:

- First in line to answer the phone. Answer questions from clients or direct to appropriate resource within the organization
- Coordinate calendars and schedule meetings for company associates, often involving our clients and business partners
- File, scan, and organize documents
- Handle shipping/receiving of client and internal mail
- Maintain Salesforce data base – regular clean up
- Processing of the Weekly Market Commentary
- Track referrals
- Provide back-up and cross-training to the other Specialists.
- Proactively contact clients to enhance client relationship
- Complete onboarding paperwork for new clients
- Complete, submit, and monitor client servicing paperwork
- Provide back-up to front desk when needed
- Greet Clients and make them feel comfortable when visiting the office
- Answer all incoming calls with exceptional customer service
- Develops, mails and analyzes client satisfaction survey
- Maintain client and prospect information in our records database
- Assist clients, financial advisors and operations with client needs.
- Assist operations in day-to-day functions.
- Assist in developing processes and procedures that enhance accuracy and streamlines processes.
- Draft, review, or edit client correspondence for the Advisors, if needed.
- Perform general clerical and operational duties as assigned
- Complete special projects as assigned.
- Order office supplies, coordinate staff luncheons, offer clients refreshments; prepare coffee and maintain kitchen

QUALIFICATIONS:

- Bachelor's degree preferred
- Minimum of two years of experience working in a professional office environment, preferably in an administrative role
- Embody mission, values and culture of the company
- Excellent follow through skills
- Possess strong financial and analytic skills
- Able to work independently and take initiative
- Strong computer and technology skills and expertise in Microsoft Excell, Word, and PowerPoint. Familiarity with contact management software a plus.
- Experience with Salesforce a plus
- Excellent interpersonal and telephone skills.
- Excellent writing skills, organizational skills, and attention to detail.
- Excellent attitude and an extraordinary client service orientation.
- Ability to handle multiple tasks and operate on tight deadlines.
- Be adaptable
- Ability to thrive in a fast-paced environment

The employee is expected to adhere to all agency policies and to act as a role model in the adherence to agency policies.