



Director of First Impressions/Client Services

Department	<i>Operations</i>
Reports to	<i>Director of Operations</i>

Summary of Position:

As the first and last person clients see when they are in the office, the Director of First Impressions plays a very important part in setting the tone for the organization, and making sure clients have a positive experience. The Director of First Impressions also assists team members in preparing for client meetings and helps ensure aspects of client accounts are properly maintained. This role will exceed expectations in providing on-going service and support to clients and to team members.

Essential Duties & Job Responsibilities:

Client Contact Management

- Greet clients serving as the welcoming face of the company. Engage in genuine conversation while the client is waiting for Advisor
- Perform reception duties in an efficient, professional and courteous manner
- Assist multiple advisors in maintaining their calendar
- Confirm appointments for multiple advisors
- Perform birthday calls to clients for multiple advisors
- Track client attendance and RSVP's for client events

Administration/Servicing

- Assist clients with changes, transactions, inquiries, requests, correspondence or re-direct, as appropriate
- Enter notes from all correspondence with clients into Salesforce database. Differentiate between on-going notes (which are not closed out) and separate actions with notes that will be "completed" upon completion
- Utilize all available resources to determine the most efficient and accurate methods to accomplish client service requests and workflow
- Maintain IRA contribution database and assist in processing annual IRA required minimum distributions for all clients of assigned advisors
- Process contributions, distributions, beneficiary changes and other servicing items for clients of multiple advisors
- Send new-client welcome letter; update status to client in Salesforce
- Create new Salesforce records and complete all preliminary information necessary for multiple advisors
- Maintain proper tracking of checks within all systems for multiple advisors

Operations

- Ensure lobby is maintained; light bulbs, cleanliness, TV, lamps, window shades, temperature, business cards and signage
- Handle all incoming calls to office directly and cover for other office as deemed necessary
- Weekly commentary
- Main point of contact for service repair technicians for: copier, telephones, building issues, etc. Report any item that needs to be escalated directly to the Operations Manager
- Set message on phone when office is closed, sign on door, etc.
- Order basic supplies for office assigned to, including office supplies, drinks, kitchen items and bathroom items

- Track postage and maintain supplies on hand for mail out for both USPS and overnight mailings; maintain online mailing accounts and password set ups
- Log and deliver daily mail and deliveries
- Track\ and maintain supply of marketing collateral; letterhead, business cards, thank you cards, firm promotional materials, etc.

Qualifications:

- 3 years of experience as an Administrative Assistant required, 5 yrs+ preferred
- Associates Degree, Bachelor’s Degree preferred
- Excellent knowledge of Microsoft Office
- Salesforce knowledge a plus
- Financial Services’ industry experience a plus

Working Conditions & Physical Requirements:

- Ability to safely and successfully perform the essential job duties of this position, with or without reasonable accommodation
- Must be able to function independently, have flexibility, personal integrity and the ability to work effectively with customers, vendors and personnel
- Occasionally lift medium to heavy objects

Other Requirements:

- Friendly, polite, organized and efficient
- Strong oral and written communication skills
- Ability to maintain regular and punctual attendance
- Adhere to all Company and department policies and procedures
- Perform other duties as assigned

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

Job Description Review:

I have read and understand the above job description and its requirements; I accept the position and agree to abide by the requirements set forth and will perform all duties and responsibilities. I understand the job functions may be altered from time to time.

I have noted below any accommodations that are required to enable me to perform these duties. I have also noted below any job responsibilities which I am unable to perform, with or without accommodation.

Employee

Date

Supervisor

Date