Financial Sales Assistant

Position Summary

The Financial Sales Assistant role will provide support for one or more Financial Advisors in the daily administration and management of wealth management, 401(k), life insurance and long term disability plans. The Financial Sales Assistant should be self-motivated with the ability to manage multiple tasks concurrently under a time sensitive delivery schedule and have strong communication and interpersonal skills.

Essential Duties and Responsibilities

The essential functions for this role include:

- Help the Financial Advisors manage their sales pipeline of new business
- Assist clients in opening new accounts and completing paperwork properly
- Handle incoming and outgoing client phone calls
- Ability to work under busy conditions with high attention to detail
- Assist with client documentation for the firm's books and records
- Maintain internal controls
- Perform general administrative duties such as mail, correspondence, and database management

Minimum Qualifications (Knowledge, Skills, and Abilities)

- College Degree or related field or equivalent work experience
- Previous experience in life insurance, RIA, brokerage or private banking firm
- Experience with eMoney, SmartOffice, Redtail, Envestnet, FiRM, Morningstar Advisor Workstation is helpful
- Life, disability and long term care insurance knowledge and state insurance license
- Proficiency in Microsoft Word, PowerPoint and Excel
- Strong interpersonal skills and a collaborative attitude

Benefits Offered- Paid Medical, Dental, Life and Disability Insurance, 401(k) with 4% match plus Profit Sharing plan. Flexible hours and vacation schedule.

Employment Type- Full Time