

Financial Sales Assistant

Position Summary

The Financial Sales Assistant role will provide support to the firm's 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 have the skills and knowledge to support these types of accounts. The Financial Sales Assistant also needs to be self-motivated with the ability to manage multiple tasks concurrently under a time sensitive delivery schedule, goal-oriented, detailed, and have exceptional communication and interpersonal skills.

Essential Duties and Responsibilities

The essential functions for this role include, but are not limited to the following:

- Handle incoming and outgoing client phone calls
- Respond to email and voicemail inquiries from clients
- Understand and be able to articulate the account opening, distributions, and investment process to clients
- Assist clients in ensuring all required forms are filled out completed
- Maintain a professional approach to client service
- Ability to work under busy conditions with high attention to detail
- Basic understanding of operations systems (forms and their purpose)
- Maintain internal controls and meet audit and regulatory requirements
- Perform general administrative duties such as mail, correspondence, maintaining customer records and client database management

Minimum Qualifications (Knowledge, Skills, and Abilities)

- College Degree in related field or equivalent work experience
- Previous experience in a financial services environment
- Experience with Schwab custody platform, eMoney, Envestnet are a plus
- Life, disability and long term care insurance knowledge and state insurance license helpful
- Proficiency in Microsoft Excel and Word
- Strong attention to detail and excellent organizational skills
- Practical problem solving
- Strong research, analytical, and interpersonal skills
- Ability to self-identify opportunities for improvement
- Collaborative attitude

Benefits Offered - Paid Medical, Dental, 401K with 4% match plus Profit Sharing

Employment Type - Full-Time