JOB DESCRIPTION
CLIENT EXPERIENCE ASSOCIATE
AUGUST 2025

WHO ARE WE?

Our team consists of financial, insurance, employee benefits, human resources, and legal professionals. We are unique in how we provide integrated planning solutions as well as care for each other, our clients, and our community. We are seeking candidates that have a caring spirit as well as embody our core values of Trust, Generosity, Compassion, Knowledge, and Patience. Our team members have a heart to serve others and a determination to get things done.

WHO ARE YOU?

You're reading this because you:

- Have a Heart to Serve – You want to make an impact in the lives of others.
- Looking for a Fresh Start – You have graduated or plateaued at your current marketing or service job and want a change of pace.
- Want to be part of a diverse team – You like the idea of learning and growing around a team of varied professionals all dedicated to serving our clients and the community.

Our Client Experience Associate needs to be a real "people person." This entry level position is for someone creative that likes to "wow" others with their ability to add that "little extra" to their day. A client facing quick starter, technology savvy, high energy individual, who excels in a diverse fast paced team environment. As a unique and valuable member of our Client Care team, you will find enjoyment engaging others while complementing our commitment to teamwork and our full circle approach towards helping our others. You should be eager to excel in your career with mentorship, educational and training opportunities, and tuition support offered by the company.

Ideally you will possess the following:

- **Education:** Bachelor's degree in Business, Communications, Marketing, or Hospitality (required)
- **Experience:** 1-3 Years of Business Development, Digital Marketing and SEO, Executive Assistance, Hospitality, or Marketing experience preferably in Financial Services (Banking, Investments, Accounting), Insurance Services (Life & Health) and/or the Legal (paralegal) Industry
- **People skills:** This position will require a lot of client interaction and follow up with our team and the public
- **Pleasant and cheerful attitude:** Enjoys fostering relationships and making a difference in the lives of others
- **Ethics:** Strong personal and professional ethics and integrity are required
- **Adaptable**: Ability to prioritize and pivot rapidly between multiple responsibilities
- **Creative:** Proven ability to think outside the box and provide a unique client experience

- **Technologically Proficient:** Above average knowledge of MS Office Suite, especially Excel, PowerPoint, and Word. You will also need to have a working knowledge of managing social media systems, client databases, and client relationship management systems (CRM's)
- **Strong Communication Skills:** Excellent verbal and written communication skills

WHAT WILL YOU DO?

- Provide direct support to the Client Care Team and our advisors, agents, consultants, and attorneys.
- Administer and maintain CRM Databases (Financial, Insurance, and Legal)
- Administer and maintain company social media posts (Facebook, LinkedIn, Twitter)
- Administer and maintain company client care processes (Newsletters, Birthday Cards, Client Gifts, etc.)
- Plan and execute client and center of influence (COI) related appreciation and lunch and learn events
- Engage with outside marketing and advertising vendors to create company branded materials
- Coordinate with strategic partners and vendors in support of client care activities
- Input and track compliance related functions (incoming/outgoing correspondence, gift blotters, advertising review submissions, etc.)
- Answer phone calls promptly, cheerfully, and provide superior customer service
- Make outbound client care calls to schedule and confirm appointments, assist with onboarding, gathering paperwork, and acting as a liaison between clients and our service specialists
- Coordinate schedules between clients, advisors, and/or vendors
- Prepare outgoing client correspondence via written letters and email
- Cross train with Client Service Specialists and assist in the following:
    - Data input, formulation, and review of all pre-meeting advisor materials and accompanying post work ensuring timely completion
    - Submission and tracking of any assigned client servicing tasks in a timely manner
    - Submission and tracking all insurance and securities related new business paperwork
    - Ensure proper completion of all outstanding client related follow up action items
    - Preparation and processing of client transactions to include: opening and closing accounts, enrollments/terminations, transferring assets, deposits, withdrawals, account title changes, address changes, etc.
    - Assist with ongoing client account maintenance (e.g., processing renewals, preparing open enrollment materials, client contact changes, vendor requests, money requests, checks, wires, ACHs, transfers, special client instructions, etc.)

- Assist with inputting and tracking compliance related functions (Check blotters, records retention, etc.)
- Any other administrative duties assigned

This job operates in a clerical office setting using standard office equipment such as computers, phones, copiers, and filing cabinets. This is largely a sedentary role but would require the ability to lift files, open filing cabinets and bend or stand as necessary. Office hours are 8:30- 5:00 pm Monday through Friday. Some after-hours time may be required to complete duties. This position does not allow for a remote work schedule.

COMPENSATION & BENEFITS

We offer a competitive starting salary and benefits package with bonuses. The starting salary range is between 40K and 60K depending on experience with opportunity for performance bonuses. Additional benefits include:

- 100% Employer Funded Health, Dental, and Vision
- Company Retirement Plan with Company Match
- Paid Time Off, Paid Holidays, and Paid Volunteer Days
- Tuition & Continuing Education Incentives

NEXT STEPS

Interested Candidates are asked to provide the following to our Human Resources Director via ContactUs@FullCircleFin.com:

- Resume
- Two Professional References