JOB DESCRIPTION
CLIENT CARE ASSOCIATE I
December 2022

WHO ARE WE?

Full Circle Financial Group, Inc. and Full Circle Insurance Solutions, Inc. are unique in the financial services industry in how we 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.

We are independent yet affiliated companies that provide Financial and Insurance services to businesses and individuals in a dynamic, fun, and often fast paced environment. As an independent firm we are "product agnostic" which means we have access to many different investment and insurance platforms which allow us to provide our clients with very customizable solutions. We are headquartered in the Hampton Roads area of Virginia and are licensed to provide services to clients in multiple states from California to Florida.

WHO ARE YOU?

We are seeking a real "people person" for this role. 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 to support our Client Care team. The ideal candidate for this entry level position should be eager to engage others while complementing our commitment to teamwork and our full circle approach towards planning for our clients. We are seeking team members that interested in being mentored while growing in their career with educational and training opportunities and tuition support offered by the company.

The ideal candidate will possess the following:

- **People skills:** This position will require a lot of client interaction and fulfillment
- Associates or Bachelor's degree (preferred)
- Series 7/66, or 65 Registrations (optional)
- Life & Health License (optional but must possess after 6 months)
- 1-4 Years of Financial (Banking, Investments, Accounting) and/or Insurance (Life & Health) Services Industry Experience (preferred)
- Must be able to pass required background check and consent to being fingerprinted.
- **Pleasant and cheerful attitude:** Enjoys interacting and making a difference in the lives of others
- **Ethical:** Strong personal and professional ethics and integrity
- **Adaptable**: Ability to prioritize and pivot rapidly between multiple responsibilities
- **Detailed:** Highly organized, accurate, and possess attention to detail
- **Problem Solver:** Proven problem-solving skills
- **Technologically Proficient:** Above average knowledge of MS Office Suite
- **Strong Communication Skills:** Excellent verbal and written communication skills

WHAT WILL YOU DO?

- Provide direct support to the Client Care Team and our advisors and agents
- Answer phone calls promptly and provide superior customer service
- Make outbound client care calls to confirm appointments, gather paperwork, etc.
- Coordinate schedules between clients, advisors, and/or vendors
- Administer and maintain company CRM Database
- 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 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.)
- Cross train with Client Service Specialists
- Assist with preparation, coordination, and follow through on any needed correspondence with prospects, clients, strategic partners, and vendors.
- Assist with data input, formulation, and review of all pre-meeting advisor materials and accompanying post work ensuring timely completion
- Assist with submission and tracking of any assigned client servicing tasks in a timely manner
- Assist with submission and tracking all insurance and securities related new business paperwork
- Assist with proper completion of all outstanding client related follow up action items
- Assist with 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 afterhours time may be required to complete duties. This position does not allow for a remote work schedule.

COMPENSATION & BENEFITS

We offer a salary and benefits package. This entry level full-time position has a starting salary between $35K – $50K per year depending on licensing and experience. We also provide:

- Health and Dental Benefits
- Company Retirement Plan with Company Match
- Paid Time Off & Paid Holidays & Paid Volunteering Days Off
- Tuition Incentives
- Performance Bonuses

NEXT STEPS

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

- Resume and Cover Letter
- Two Professional References