JOB DESCRIPTION
CLIENT SERVICE SPECIALIST I
SEPTEMBER 2024

WHO ARE WE?

Our team consists of financial, insurance, and legal professionals. We are unique in the financial and legal services industry in how we provide comprehensive and 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:

- Want to Test the Waters – Are you looking for greener pastures?
- Desire Higher Compensation – Do you want to earn more than just a salary?
- Seek Professional Growth – Do you feel you're not growing professionally and want to be exposed to a multi-disciplinary approach to planning clients' futures?
- Feel Undervalued – Are you stagnant in your current position and think you're ready to break out and realize your full potential?

As one of our Client Service Specialists, you will be a key player on our Client Care Team. To be considered, you need to be: (1) highly organized, detailed oriented, and thrive in a fast-paced environment, (2) an experienced financial, insurance, and/or legal professional with quantifiable success, (3) want to learn and grow professionally while complementing our commitment to teamwork and our Full Circle approach to planning for our clients. You will need to bring your "A" game in all you do while being acknowledged, valued, and compensated accordingly. You should also be eager to excel in your career with mentorship, education and training, and tuition support.

Ideally you will possess the following:

- **Education:** Bachelor's degree (required)
- **Licensed:** Life & Health License (required)
- **Registered:** Series 7/66 or Series 65 Registrations (preferred or obtained within 6 mo.)
- **Experience:** 5+ Years of Financial (Banking, Investments, Accounting) Insurance (Life & Health) Services and/or Legal Industry Experience (required). Must be able to pass required background check.
- **Detailed driven:** This position will require a high level of attention to detail along with paperwork and planning preparation.
- **Adaptable**: Ability to prioritize and pivot rapidly between multiple tasks/responsibilities
- **Closer**: A task master that enjoys seeing a task to completion.
- **Problem Solver:** Proven analytical and problem-solving skills

- **Pleasant and cheerful attitude:** Enjoys interacting and making a difference in the lives of others
- **Ethics:** Strong personal and professional ethics and integrity are required
- **Technologically Proficient:** Above average knowledge of MS Office Suite especially MS Excel and PowerPoint.
- **Proficient Communication Skills:** Good verbal and written communication skills

WHAT WILL YOU DO?

- Provide direct support to our team of advisors and client care team
- Answer phone calls promptly and provide superior customer service
- Data input, formulation, and review of all pre-meeting advisor materials and accompanying post work ensuring timely completion
- Prepare, coordinate, and follow through on any needed correspondence with prospects, clients, strategic partners, and vendors.
- Estate Planning and Business Succession Document Preparation
- Prepare, submit and track all assigned client servicing tasks in a timely manner
- Prepare, submit, track, and complete all insurance and securities related new business paperwork
- Ensure completion of all outstanding client related follow up action items
- Prepare, submit, and process client transactions to include: opening and closing accounts, enrollments/terminations, transferring assets, deposits, withdrawals, account title changes, address changes, etc.
- Provide 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.)
- Input and track compliance related functions (Check blotters, records retention, etc.)
- Cross train with Client Care Associates
- Assist with making outbound client care calls to confirm appointments, gather paperwork, etc.
- Assist with coordination of schedules between clients, advisors, and/or vendors
- Assist with maintenance of company CRM Database
- Assist with maintenance of company social media posts (Facebook, LinkedIn, Twitter)
- Assist with maintenance of company client care processes (Birthday Cards, Client Gifts, Etc.)
- Assist with execution of client and center of influence (COI) related events
- Assist with engagement of outside marketing and advertising vendors to create company branded materials
- Assist with the coordination of strategic partners in support of client care activities
- 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. Very rare evening and weekend work may be required as job duties demand.

COMPENSATION & BENEFITS

We offer a competitive salary and benefits package with bonuses based on licensing, registrations, and the performance of the individual and the practice. Starting salary is between 45K and 65K depending on licensing and experience plus bonuses. We also provide:

- Health and Dental Benefits
- Company Retirement Plan with Company Match
- Paid Time Off, Holidays, and Volunteering Days Off
- Tuition Incentives
- Relocation Expense Reimbursement

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