JOB DESCRIPTION
CLIENT SERVICE SPECIALIST I
December 2021

CLIENT SERVICE SPECIALIST I

Full Circle Financial Group and Full Circle Insurance Solutions Inc are independent but affiliated companies that provide Financial and Insurance services to businesses and individuals in a dynamic, fun, and often faced paced environment. We primarily work in the Hampton Roads area of Virginia but are licensed to provide services to clients in multiple states from California to Florida.

In addition to receiving tailored advice around our client's health and wealth planning, we also welcome and incorporate the other professionals that provide services in their everyday lives. From mortgage, tax, and legal professionals, to their home and car insurance agent, and down to their healthcare provider and pharmacy, we coordinate with them so they look at their lives Full Circle!

POSITION DESCRIPTION

We are seeking a quick start, high energy individual, that excels in a fun and fast paced team environment to work as part of our Client Care team. A skilled financial and insurance professional with quantifiable success operating on an independent platform through insurance, advisory, and a variety of directly held securities firms. The ideal candidate will want to learn and grow professionally while complementing our commitment to teamwork and our full circle approach to planning for our clients. They will bring their "A" game in all they do and be acknowledged, valued, and compensated accordingly.

QUALIFICATIONS

The ideal candidate will possess the following:

- Associates or Bachelor's degree (optional)
- Series 7/66, or Series 65 Registrations (preferred or must obtain within 6 months of hire)
- Life & Health License (required)
- 2-5 Years of Financial Services Industry Experience (required)
- Pleasant and cheerful attitude about helping others
- Strong personal and professional ethics and integrity
- Ability to prioritize and pivot rapidly between multiple responsibilities
- Highly organized, accurate, and possess attention to detail
- Proven analytical and problem-solving skills
- Highly proficient in MS Office including Excel, Word, and PowerPoint
- Excellent verbal and written communication skills
- This job operates in a clerical office setting. This role routinely uses standard office equipment such as computers, phones, copier and fax machines.

- This is largely a sedentary role but would require the ability to lift files, open filing cabinets and bend or stand as necessary.
- Work schedule is Monday - Friday, 8:30- 5:00 pm. Very rare evening and weekend work may be required as job duties demand. We are family friendly and will reasonably accommodate working remotely on a limited basis.
- Must be able to pass required background check and consent to being fingerprinted.

ESSENTIAL DUTIES

- Provides direct support to two seasoned advisors
- Execute and track any assigned client servicing tasks in a timely manner
- Execute and track the processing of insurance and securities related new business submissions
- Ensure completion of all outstanding client related follow up action items
- Assist with data input and formulation and review of all pre-meeting advisor materials and accompanying post work while ensuring timely completion
- Prepare 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.)
- Prepare, coordinate, and follow through on any needed correspondence with new or existing clients, securities back office, and insurance carriers
- Assist with compliance related functions (check blotters, incoming/outgoing correspondence, advertising review submissions, etc.)
- Answer phone calls promptly and cheerfully
- Assist with coordination of schedules between clients and advisors
- Make outbound proactive client care service calls
- Maintain company client service platform and CRM
- Run office errands as necessary
- Any other administrative duties assigned by Practice Manager and Advisors

COMPENSATION & BENEFITS

FCFG & FCIS offers a competitive salary and benefits package with bonus potential based on performance of the individual and the practice. Starting salary is dependent on licensing and experience with a range between $45,000 - $55,000 plus bonuses. We are also proud to provide 100% Employer paid Health and Dental Benefits along with a company Retirement Plan with Company Match for our full-time employees. Paid Time Off accrues at 10 days per year with some annual carry over.

NEXT STEPS

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

- Resume and Cover Letter
- Salary Requirements
- Two Professional References