JOB DESCRIPTION
CLIENT CARE ASSOCIATE I
MARCH 2025

WHO ARE WE?

Our team consists of financial, insurance, employee benefits, and legal professionals. We are unique 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?
- Need a Change of Pace – Are you stagnant in your current position and think you're ready to break out and realize your full potential?

As our Client Care Associate, you will need to be 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. You will enjoy engaging others while complementing our commitment to teamwork and our full circle approach towards planning for our clients. You should also 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:** Associate or bachelor's degree with Marketing or Hospitality focus (preferred)
- **Licensed:** Life & Health License (optional)
- **Registered:** Series 7/66 or Series 65 Registrations (preferred or obtained within 6 mo.)
- **Experience:** 3-5+ Years of Business Development, Hospitality, or Marketing in Financial Services (Banking, Investments, Accounting) Insurance (Life & Health) Services and/or Legal (paralegal) Industry Experience (required)
- **People skills:** This position will require a lot of client interaction and fulfillment
- **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
- **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
- **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 competitive salary and benefits package with bonuses based on licensing, registrations, and the performance of the individual and the practice. Starting base compensation will range between $55K - $75K depending on experience. You will also be eligible for bonuses after a year determined by licensing and registrations held at the time. 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 Incentives
- Flex Time Opportunities
- Relocation Expense Assistance

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