**Full Circle**
Financial Group

**JOB DESCRIPTION**
**CLIENT SERVICE SPECIALIST I**
**May 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 will 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 customized 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?

The ideal candidate will possess the following:

- Associates or Bachelor’s degree (preferred)
- Series 7/66 or Series 65 Registrations (preferred or obtain within 6 mo. of hire)
- Life & Health License (required)
- 4+ Years of Financial (Banking, Investments, Accounting) and/or Insurance (Life & Health) Services Industry Experience (required)
- Must be able to pass required background check
- **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 analytical and problem-solving skills
- **Technologically Proficient:** Above average knowledge of MS Office Suite
- **Strong Communication Skills:** Excellent verbal and written communication skills

Our Client Service Specialists are the key players on our Client Care team. They are high energy individuals that thrive in a fast-paced environment. 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. Our 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. As an experienced professional, we know they will bring their “A” game in all they do and be acknowledged, valued, and compensated accordingly. They should be eager to excel in their career with educational and training opportunities and tuition support offered by the company.

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## WHAT WILL YOU DO?

- Provide direct support to the Client Care Team and three advisors
- Prepare, submit, and track all assigned client servicing tasks in a timely manner
- Prepare, submit, and track all insurance and securities related new business paperwork
- 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 meeting work 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 and insurance carriers
- Assist with compliance related functions (check blotters, incoming/outgoing correspondence, advertising review submissions, etc.)
- Answer phone calls promptly and provide excellent customer service
- Assist with coordination of schedules between clients and advisors
- Make outbound client service calls
- Maintain company client service platform and CRM
- 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. We are family friendly and will reasonably accommodate occasionally working remotely on a limited basis.

## COMPENSATION & BENEFITS

We offer 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 $45K - $60K plus bonuses. We are also providing:

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

## 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