Full Circle Financial Group

JOB DESCRIPTION
CLIENT SERVICE SPECIALIST 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?

Our Client Service Specialists are key players on our Client Care Team. They are highly organized and efficient individuals that thrive in a fast-paced environment. A skilled financial and/or 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 mentorship, educational and training opportunities, and tuition support offered by the company.

The ideal candidate will possess the following:

- **Results driven:** This position will require a lot of data and product analysis along with paperwork and planning preparation.
- 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 especially MS Excel and PowerPoint.
- **Proficient Communication Skills:** Good 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
- Prepare, coordinate, and follow through on any needed correspondence with prospects, clients, strategic partners, and vendors.
- Data input, formulation, and review of all pre-meeting advisor materials and accompanying post work ensuring timely completion
- 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 coordination with strategic partners in support of client care activities
- Assist with inputting and tracking of compliance related functions (incoming/outgoing correspondence, gift blotters, advertising review submissions, 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. Very rare evening and weekend work may be required as job duties demand. We 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 $38K - $55K plus bonuses based on licensing and “first year” and trailing revenue. We are also providing:

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