Client Services Manager

Financial Services Industry - Part Time

POSITION SUMMARY:

Provide Marketing and Administrative support to one or more Financial Planners in a San Ramon area Financial Planning Office.

ESSENTIAL JOB DUTIES:

SALES AND MARKETING

Maintain and Monitor the Marketing Calendar:

- Create a rotating schedule of the various outreach and social media activities, newsletters, and events while ensuring Rep or Staff implements items, in a timely manner.

Design & Create:

- Design marketing and event materials in Microsoft Publisher or other software as requested by Rep(s) and arrange for distribution (hard copy or electronic) per marketing calendar schedule.
- Select and develop promotions in creative ways to market using Social Media markets.

Write:

- Work with Rep(s) to find and/or write articles for periodic newsletters. Ensure submission to Compliance Dept. for approval prior to distribution via *Constant Contact.*

Phone Outreach:

- Research and respond to outstanding client issues / service requests / scheduling needs.
- Reach out to new prospects, to keep in touch and invite them to consider engaging our services.

Event Planning:

- Assist with planning, execution and task details of Client events and activities.
- Create and/or update presentations while communicating with eternal creative service providers.

Assist Reps in Creating a First-Class Client Experience:

- Create and maintain a great first impression office environment for clients and guests. This could include greeting, handling catering and drinks, frequent telephone, e-mail and in-person communications & outreach, birthday cards, and more.

ADMINISTRATIVE

Keep Reps "Organized."

- Provide "Calendar Management." Set appointments, manage meeting logistics, and prioritize Financial Advisor's tasks.
- Provide back-up materials for calls, meetings, and appointments
- Maintain office files and reporting systems related to clients, assets and production, expense reporting & tracking, compliance reports, product information, mileage logs, etc.
- Screen email to control interruptions, and handle phone, mail and email communications as requested

Paperwork & New Business Processing:

- Prepare, input, and process new accounts in a timely manner; including tracking current status, moving to next steps, following up as needed, and communicating additional requirements to the Team.
- Handle Client servicing requests.
- Input basic financial planning data into Financial Planning software (MoneyGuide Pro), as needed.

Create Efficiencies and Document Processes:

- Creating a paperless (well almost) environment, by scanning and shredding older paper files
- Document existing or create new operational processes, to create an Office Procedures Manual

Maintain and update Client and contact information:

- Verifying monthly billing on fee based accounts
- Formatting and downloading Client statements, as needed for periodic reviews
- Keeping the Client Record Management System (CRM) updated, including adding new contacts.

QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES:

- *A Big Picture View:* Exhibit the ability to see the big picture, and use good judgment, to organize and prioritize work effectively. Proven track record of easily solving problems and effectively managing multiple work projects.
- *Friendly:* Exhibit a caring and professional demeanor, including a warm and friendly phone and personal presence.
- *Excellent writing skills:* Excellent business writing and proofreading abilities, and a strong attention to detail and accuracy.
- *Excellent computer skills:* Strong working knowledge of Microsoft Office applications. Computer savvy with internet research skills and social media. Familiar with the workings of CRM software.
- *Business Skills:* Work well independently, as well as, collaboratively with others. Take ownership and have consistent, accurate follow through to completion. Have a keen interest in understanding how to run a business, and a thirst to learn new things every day.
- *Superb Integrity:* Honesty and ethics are unquestioned. Proven ability to exercise diplomacy and confidentiality in communicating with others.
- Must pass a background check.

EDUCATION AND WORK EXPERIENCE:

Education: Higher education is definitely a plus, but not essential

Work experience:

- Minimum 3 to 5 years administrative experience
- Experience in the financial services industry is highly desirable
- Experience with marketing and meeting planning and coordination is essential.

HOURS:

- Temp to Hire position. 20 - 24 hours / week.
- ***Flexible work hours*** *(with plenty of advance notice)* can help accommodate your family, community, and other outside commitments, as well as commute considerations.

COMPENSATION:

- $18 to $20 per hour (commensurate with experience).
- ***Bonuses will be paid,*** as the firm production grows and new clients are added.

INTERESTED?

Contact **Mary Hanson:** maryh@hwsfinancial.com / Office: (925) 309-4284 / Mobile: (925) 785-1415