

Director of Client Services – Wealth Management

Local financial planning firm is seeking a professional, refined, friendly, and bright Director of Client Services. We are looking for someone with excellent interpersonal skills, extraordinary client service attitude, phone skills, professionalism, confidence, and a genuine interest in people. This position plays an important role in setting the tone for the practice and making sure clients and prospects have a positive experience and maintain our exceptional culture of integrity and relationship building.

Responsibilities & Activities:

- Handle inbound phone calls, oversee calendar management to coordinate business appointments, conference calls and travel
- Make clients and prospects feel comfortable when they visit the office, greet and handle other visitors/vendors, reject solicitors
- Process all new business including investment and insurance accounts
- Interface with compliance department and assist clients with all financial transaction requests
- Assist with database management, coordinate client financial plan reviews and run asset allocation models for investment portfolio review
- Assist with preparing and/or processing paperwork and correspondence
- General office tasks such as copying, scanning, sorting, and organization
- Assist in maintaining orderly, clean, and efficient office
- Assist in other tasks and projects as assigned
- Sort and distribute mail, handle vendor relations, order and maintain office supplies, management of sales material inventory

Knowledge, Skills, and Abilities:

- Redtail CRM and eMoney experience a plus
- Financial licenses a plus but, not required
- Attention to detail and accuracy in work, ability to work fast and meet deadlines
- Professional demeanor and appearance
- Interpersonal skills; able to effectively and professionally interact with others
- Excellent written and verbal communication; via phone, email, in person, etc.
- Excellent and proactive organizational and time management skills
- Ability to multi task efficiently, work independently, manage workload, take a proactive approach to problems
- Proficient in MS Word, Excel, and PowerPoint and general computer skills

Our office is located in San Ramon. Currently, we are searching for a part time or full-time candidate; salary will depend on experience and qualifications. Benefits may be included after a probationary period. Must submit to fingerprinting and pass a background check.

Please submit resume and cover letter via email; to karenTharrison@gmail.com