Client Service Specialist

Description
One of the larger Northeast Ohio firms is looking for a hard-working client relations Specialist with industry experience who is motivated to deliver exceptional client service and thrive in a fast-paced work environment. The growing firm offers the opportunity to take on additional responsibility within the firm and encourages career development and strategic growth initiatives. Those that excel in this position may develop into the Director of Client Services role and/or proceed on a path to Associate Advisor, if applicable.

Primary Functions
The Client Service Specialist is an integral part of the overall client experience, engaging in frequent client contact and serving as liaison between the client and our Planning and Investment Team. A high degree of direct communication with clients is required, with the Client Service Specialist delivering the personalized service that lays at the foundation of everything we do to make a satisfying, memorable client experience.

In this role, you can expect to-

- Become fully aware of the client base – who they are, any special needs they might have, ongoing tasks for each client relationship, etc.
- Be able to communicate effectively regarding open tasks, client needs, etc. in order to ensure we are meeting clients' expectations and delivering exceptional service and seek to promote customer convenience in any contact they have with the firm.
- Process any returned documents from clients including contracts & investment policy statements, applications, transfer paperwork, etc. according to established department procedures.
- Effectively manage and prioritize workflow created from CRM action items, phone calls from clients, emails, and additional projects.
- Oversee the client onboarding process to make sure everything gets set up and transferred efficiently while making sure we provide updates to the client as appropriate.
- Monitor and review client account activity and verify that all requests to custodians are received and handled to completion.
- Develop an understanding of the industry and strive towards a thorough understanding of firm services, philosophies, policies and procedures.
- Recognize that their delivery of an exceptional client experience is the key to the firm creating powerful, lasting relationships with our clients

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Qualifications

- Desired to have at least 3-5 years of financial industry experience with proven ability to build lasting client relationships
- Knowledge of investments, investment products, financial planning and use of financial planning tools
- Excellent verbal and written communication skills as well as someone who takes pride in their work.
- Organizational skills and attention to detail are critical given the nature of paperwork, processes, and work
- Ability to effectively prioritize workloads and complete tasks within well-defined guidelines and time constraints is essential.
- Strong computer skills with Microsoft Office proficiency and CRM software experience. Familiarity with portfolio accounting systems (Tamarac, Orion, other), Junxure, NetX360 and Laser App are a plus.
- Strict compliance and adherence to all regulations and policies
- Bachelor's Degree Required, Licensing encouraged

For consideration, please send your cover letter and resume to HR@reed-financial.com.