

Position Description  
**Business and Planning Support Coordinator**

**Objective:**

The primary objective of the role is to provide support needed in the areas of business management and personal financial planning. This team member will be responsible for managing, monitoring and reporting on the revenue and expense process. This includes cash management, business processing, periodic team financial reporting and all related work assignments. Additionally, this team member will be responsible for managing the prospect pipeline and the client financial planning process. This includes preparing financial analyses, modeling scenarios and techniques for financial plans, preparing annual client playbooks, and all related work assignments. Below is a sample list of specific work functions.

- Preparing applications for new securities and insurance accounts
- Managing the new account establishment process
- Managing team bank account and spending
- Accounting/reporting team revenue and expenses comparative to budget
- Managing the team calendar
- Organizing and leading weekly, quarterly and annual meetings
- Preparing financial analyses for prospects
- Modeling financial strategies and scenarios for client personal financial plans
- Preparing client annual review packet including financial plan and client playbook
- Managing the prospect pipeline insuring all steps are timely completed
- Managing the client financial planning process insuring all steps are timely completed
- All related work assignments

It should also be noted that as this is a new position for CapitalStrategies-RW, the objective and specific works functions may change as needed.

**Profile:**

We believe the successful candidate for this position will be willing to effectively take charge of business processes, work independently, be able to communicate business sensitive topics with partners, be able to communicate effectively with clients and prospects, be thorough in the completion of forms and reports, and will likely have business/finance experience and education and/or specific industry experience.