Financial Innovations is a fee-only wealth management firm committed to helping our clients Walk in Wisdom® using biblical wisdom principals and investment science. Our headquarters is located in Prosper, Texas.

CLIENT SERVICES MANAGER

The Client Services Manager will provide day to day operational and administrative support to our adviser team. The position requires independent judgment and action in a wide variety of areas. The successful candidate must represent the company in a positive manner in every aspect of the position, with the ability to provide superior customer service and maintain cooperative working relationships.

Qualities:

- Possesses proven ability in and enjoys developing, implementing, managing, and modifying organizational processes and procedures.
- Demonstrates exceptional skills in planning, process flow, prioritizing, and problem resolution.
- Exhibits a true passion to help team members and clients succeed.
- Detail oriented.
- Goal-oriented; task driven.
- Notable communication and interpersonal skills.
- Customer service/client-focused background in developing and maintaining client relationships.
- Aptitude and willingness to learn.
- Basic understanding of financial services industry.
- Enjoys being part of the team.

Functional Responsibilities:

- Supports the COO in the implementation of the business plan.
- Coordinates client and other meeting arrangements.
- Assists adviser team in preparing all documents for client on-boarding and ongoing client meetings and presentations.
- Assists clients with various tasks including paperwork, contributions and distributions, etc.
- Maintains confidential data files as well as functional data bases.
- Provides general office administrative support.
- Administers office equipment needs.

Education and Experience Requirements and Preferences:

- High School diploma; bachelor's degree preferred.
- Two to four years of office management experience.
- Proficient in Microsoft Office suite (Word/Excel/Power Point/Outlook)
- Experience with Salesforce or other web-based CRM is preferred.
- Experience with advisory tools Orion and eMoney a plus