Client Services Manager

Retirement Extender® is looking for a Client Services Manager (CSM) to manage the overall relationship with a portion of our clients. We are a growing wealth management firm with roots going back to 1993. Mindful of differing investment objectives, risk tolerance, and liquidity needs, the firm helps individuals and families using an integrated approach. In this framework we combine planning specialists, portfolio specialists, and tax specialists into a single team to provide multidisciplinary long term financial advice for each client. These specialists work simultaneously to prepare a plan utilizing their investment knowledge, tax knowledge, and financial planning knowledge. The firm has a strategic advantage in tax efficient distribution methodology.

The firm operates in an ethical fiduciary standard environment, focusing on our client's needs. The firm is owned by an individual with the credentials of CPA, CFP® and ChFC®.

The CSM plays a vital role in establishing and maintaining a productive relationship between the firm and our clients. Acting as a link between clients and other members of the team, the CSM communicates with clients and assists them, in person and over the phone, in financial transactions, service requests, and meeting set-ups, and other tasks in response to the client's needs. The CSM may also contact clients to pass on communications from management or to follow up on previous chains of communications.

Job Responsibilities:

- Successfully complete the Series 65 licensure within 120 days of hire.
- Complete proprietary training in the firm's methods for Concurrent Financial Planning
- Become proficient is using the firm's software including: Redtail CRM, Redtail Imaging, Lacerte®, Morningstar Office, Laser App, and Money Guide Pro®
- Strong knowledge of Microsoft Office 365 software including Outlook, Excel, Word, & Power Point

Job Requirements:

- Possess a basic knowledge of: Financial Planning concepts, Economics, Finance, Investments, and Income Tax.
- Be process driven with a high attention to detail and accuracy
- Have a high math aptitude
- Excellent communication, presentation, time management and organization skills
- Able to work proficiently with outside money managers & custodial firms in servicing new accounts, account transfers, disbursements, and handling account paperwork
- The ability to cope calmly and professionally with multiple demands in a changing work environment and to be flexible in adjusting priorities to evolving client and firm needs
- The ability to communicate with clients via phone, email or in-person meetings and listen to their needs and work with the team to ensure that those needs are met
- Assist in the preparation/completion of client reports
- Assist in portfolio work, income tax returns and financial plan preparation
- Manage client meeting information, and meeting materials
- Maintain client information by entering documents, notes, activities and tasks in CRM and Imaging system
- Maintain blotters and tracking logs

Retirement Extender® is located next to the Journal Center Business Park in Albuquerque and has convenient access to city transportation. Whatever your hobbies, Albuquerque has something for you: beautiful hikes in the Sandia Mountains, great bike trails, a shining restaurant scene, and so much more. Don't be surprised to see hot air balloons dot the morning sky; we are home to the annual International Balloon Fiesta.

How to apply: Please apply by addressing cover letter and resume to Holly at Holly@retirementextender.com

Job Type: Full Time

Required Education: Bachelor's degree in business, finance, math, or a related field.

Wages: $17.50 - $20 per hour

Benefits: Health insurance after 90 days, SIMPLE IRA retirement plan, 10 days PTO

Candidates must be authorized to work in the U.S without restriction as to duration and will undergo background checks/fingerprinting and pre-employment assessments.