



Independent Branch Client Service Specialist – Registered

McKinney Independent Branch
2775 S. Central Expressway, Suite #140
McKinney, TX
Tel: (214) 385-4142

Independent Branches, led by a Schwab franchisee and staffed by employees of the franchisee, help individuals and families with their financial needs, including retirement planning, investing, charitable giving, estate planning, and active investing. To learn more about Schwab's client offerings visit:

http://www.aboutschwab.com/about/overview/investor_services

Independent Branch Client Service Specialists are **not** employees of Charles Schwab & Co., Inc.; they are employees of the Independent Branch Leader (Schwab franchisee) and are Associated Persons of Charles Schwab & Co., Inc.

Schwab Independent Branch in McKinney, Texas is looking for a **Registered Independent Branch Client Service Specialist** with a passion for serving clients.

ROLE DESCRIPTION

- Greeting clients and prospects with genuine enthusiasm as they arrive at the Independent Branch
- Delivering outstanding service and providing all clients an exceptional experience
- Assisting the Independent Branch Leader and sales staff with meeting clients' needs

RESPONSIBILITIES

- Greet clients in person and over the phone
- Receive checks and security deposits, and process new accounts
- Schedule client consultations
- Assist Independent Branch Leader and Financial Consultants in gathering new assets
- Proactively uncover additional business development opportunities
- Placing trade orders
- Answer securities-related questions

SKILLS & QUALIFICATIONS

We place a premium on high performance, quality service and the ability to execute the Schwab Independent Branch strategy. Essential skills include:

- Minimum two years experience in a direct client facing role
- Detail oriented
- Demonstrated experience handling client concerns and issues with tact and diplomacy
- Ability to manage multiple client situations, needs and inquiries simultaneously
- Ability to work independently and as part of a team
- Must be able to develop and maintain good cross enterprise working relationships
- Must be proficient with Microsoft Office and CRM software
- Basic understanding of brokerage regulations and rules that govern client accounts
- Outstanding written and oral communication skills
- Bachelor's degree or equivalent work related experience

- Series 7 and 63 (or 66) licenses required (may be obtained within 90 days of start)

This is a summary only and duties and responsibilities may be revised over time.

HOURS & COMPENSATION

This is a full-time position.

Hours are generally 9-5 Monday through Friday.

Benefits package includes employer paid health insurance and 401(k).

Compensation commensurate with experience.

Apply

Please provide your resume to jessica.willman@schwab.com