<u>Client Experience Manager</u>

Provides service, financial planning, investment management and office administration support to Clients and Financial Advisors.

Principal Accountabilities:

1. Initiates and monitors administrative details to serve team and clients with excellence, which include but are not limited to:

- Manages all procedures and follow-up necessary to service investment accounts (e.g., processing applications, deposits, withdrawals, transfers; and generating various investment reports as needed).
- Prepares requested client investment reports and planning reports
- Transcribes or composes routine correspondence and emails with speed and accuracy and in keeping with the highest business standards.

2. Works in conjunction with Manager and team to initiate and organize meetings and respond to client inquiries regarding actions taken to accomplish goals including:

- Answer phone calls, screen, identify needs of clients, assign to right team member or handle requests
- Coordinates the scheduling of team appointments, meetings, and travel arrangements.
- Greets team's visitor(s) or client(s) in a warm, welcoming manner.
- Proactively plans for and responds to urgent needs.
- Understands the financial planning philosophy and biblical basis upon which Ronald Blue Trust serves its client base.
- Approaches work, interactions and relationships in a manner consistent with the company's Core Values.

3. Provides administrative support to Manager in a manner consistent with service standards, including:

- Maintain accurate electronic records and database of prospect and client information in accordance with compliance guidelines and regulations, including maintaining well indexed and up-to-date electronic file systems for correspondence, reports and reference material, and confidential and non-confidential material.

- Gathers, records, and processes pertinent information from clients or financial institutions for record maintenance or further analysis by other team members.
- Effectively utilizes CRM, Portfolio and Planning systems to maintain records in an accurate, up-to-date manner.
- Answers incoming calls and emails in a professional manner, providing routine information or referring to the appropriate team member when needed.
- Actively builds efficiencies and effectiveness into administrative and clerical tasks.
- Performs some branch accounting tasks, such as accounts payable and receivable, as required and forwards all other branch accounting information in a timely manner to the Finance department for processing.
- Processes incoming and outgoing mail efficiently.
- Ensures office equipment is properly maintained.

4. Processes financial planning fees, generates invoices and maintains updated Client Income Projection report in a timely, and accurate manner.

5. Supports and completes special company-wide projects in accordance with prescribed standards and guidelines.

6. Maintains the highest Compliance standards by adhering to the company's Human Resources guidelines, Compliance policies, professional designation standards, and our industry's regulatory standards to mitigate risk to the company.

Education, Experience & Skills:

- Bachelor's degree in Management, Business, Finance, Accounting or a related field is preferred.
- Minimum of three (1) years prior experience in a support role in administrative support, customer service, or accounting in a financial, investment, banking or accounting company is strongly preferred.

Michael J. Davidson MEnvE, CFP®, CKA®, AIF®

Principal

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