**Strategic Wealth Advisor Team**

**Job Description**

***Client Service Manager***

**Position Description & Summary of Role:**

Assist financial advisor(s) and associate financial advisor(s) in managing and organizing office work flow with an emphasis on creating and delivering a unique client experience that defines and differentiates the practice. This role interacts with clients very regularly and is in many client appointments to take notes and deliver messaging.

The Client Service Manager works closely with the advisor to complete transactions for clients, research and resolve issues that affect clients, submit all new business, insurance and transfers, track all business, letters, transactions, transfers, and insurance to ensure all are complete and correct, help support other members of the staff including the client service associates with questions from clients and preparing forms for new business items.

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| 80% | Client Service/Business Management |
| * Responsible for preparing and summarizing client meetings, completing service checklist, organizing and printing out appropriate reports, and providing follow-up. Provides necessary client follow-up from initial client appointment. * Prepares and ensures financial advisors’ new business paperwork processes successfully, including preparing forms, obtaining appropriate signatures, and tracking new business. * Complete any business passed to you from advisor including applications for new business, account maintenance, and applying funds in the form of checks to appropriate accounts. * Make brief notes each day in client management software concerning trades, transactions, follow up, and tasks for others. * Assist the advisor, client service representatives, and office manager with various tasks throughout the day. * Sit in client meetings to take notes as well as call clients for explanations of issues or for trade authorizations including email/letters for new applications as directed by the advisor. * Communicate issues we have with HO to the advisor and provide feedback they can act upon. * Assist with projects as needed or assigned by office manager and advisors. * Composes and responds to routine correspondence. * Uploads digital documents, scanning, and electronic file maintenance. * Accepts and performs other duties as assigned. | |
| 20% | Business Development |
| * Marketing activities to include event planning, prospecting, and new client on-boarding. * Insurance specialist responsibilities including proposal generation, applications, underwriting requirement support, understanding of products, and prepping insurance recommendations for advisor meetings. | |

**To inquire, please contact:**

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Please visit [Strategic Wealth Advisor Team - Plano, TX | Ameriprise Financial (ameripriseadvisors.com)](https://www.ameripriseadvisors.com/team/strategic-wealth-advisor-team)for more information about us!