**Client Service Associate**

**Summary:** Saxon Financial Group seeks a highly energized and confident Client Service Associate who will thrive in a professional environment. Candidate must be extremely professional in appearance and manner, willing to accept direction, quick to learn new things, and computer savvy. Superior phone and computer skills required.

**Essential Duties and Responsibilities**

(Additional duties may be assigned):

* Providing administrative support to Financial Advisors
* Monitor and manage Financial Advisor’s calendar and sales leads
* Field inbound phone calls, take messages, transfer calls, and manage voicemails
* Performing other office tasks such as copying, taking messages, distributing mail items, etc.
* Perform general administration and support functions for the office as required
* Research and resolve client service problems for error as needed
* Perform other duties and projects as assigned
* Assist with marketing and events as needed

**The ideal candidate will possess the following skills:**

* Previous customer service experience
* Ability to communicate with co-workers, customers, and various business contacts in a courteous and professional manner
* Ability to investigate, research, and resolve problems and concerns
* Ability to maintain confidentiality
* Ability to make rule-based and analytical decisions
* Ability to organize, prioritize and handle multiple tasks
* Ability to pay close attention to detail, work under pressure and meet deadlines
* Ability to take complete and accurate notes
* Skill in operating various office equipment including personal computer, fax machine, copier, etc.
* Skill in utilizing various software packages such as Microsoft Office & Outlook
* Skills in written and verbal communication

**Language Skills:** Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, etc. Ability to draft effective business correspondence. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

**Reasoning Ability:** Ability to define problems, collect data, establish facts, and draw valid conclusions.

**Computer Skills:** Have knowledge of internet software, spreadsheet software, and word processing software.

If interested in this position, please send your resume to amanda@saxonfinancialgroup.com