Financial Planning & Financial Services
Client Service Specialist

Description

As a Client Service Specialist, you will be an integral part of a premier fee-only Financial Planning & Registered Investment Advisory (RIA) Firm serving Dentists in the Pacific Northwest. You will serve a vital role meeting the needs of our clients and helping to manage day-to-day operations in a brand-new office in Snoqualmie (right off I-90, 25 miles East of Seattle). As fiduciaries sworn to act in our clients' best interest, we are committed to helping our clients live their ideal lives by aligning their financial resources with their life goals. If you enjoy helping people and desire to join a team of professionals committed to superb customer service and strategic growth and you value trust, vision, relationships, experience, service, communication and technology, we want to work with you!

Responsibilities

- Act as the "face" of our firm, communicating effectively with clients over the phone and by email to resolve any outstanding issues of transferring accounts or in the paperwork process.
- Support Financial Advisor(s) in processing investment paperwork including opening investment accounts and overseeing investment transfers, completing & submitting custodian and client paperwork accurately via mail or DocuSign, following up with clients and communicating with the investment custodian and resolving NIGO documents or issues.
- Maintain accuracy, completeness and integrity of client data within our client relationship management system. Verify client accounts are established and transferred correctly. Master client on-boarding process.
- Provide general office support for the business, including basic office responsibilities: answering phones, scanning, office organization etc.
- Help maintain the advisors' calendar. Initiate phone and email follow-ups to schedule meetings for clients.
- Organize the office to improve efficiency of office procedures and processes.
- Handle any other tasks within an administrative capacity, taking charge to organize and create new systems and processes to improve efficiency.

Qualifications

1. Highly organized, process-oriented and accurate with the ability to follow through and maintain close attention to detail.
2. A passion for serving clients with the ability to solve problems and anticipate client needs.
3. Superb verbal and written communication skills, especially the ability to listen and empathize with clients.
4. Knowledge of key financial, investment and risk management concepts and experience working in an investment firm helpful, but not required.
5. Administrative experience with ability to communicate and work well with others.
6. Proficiency in Word, Excel, Outlook and CRM software and extremely comfortable with technology.
7. A self-starter with time management skills and ability to work with little supervision.
8. Ability to handle multiple tasks and operate on tight timelines.
9. A team player who is highly flexible, collaborative, responsive and proactively engaged in building relationships.
10. Dedicated to highest integrity and maintaining confidential information.

Company Overview

Financial Freedom for Dentists LLC provides comprehensive fee-only financial planning and investment management for Dentists and their partners. We empower clients to reach their goals of financial freedom using an investment management philosophy based on academic research and evidence-based results.

Our Vision

Founded by Nathan Ricks, a Certified Financial Planner^{TM} Professional with over 20 years of industry experience, and a member of the Financial Planning Association (FPA) and the National Association of Personal Financial Advisors (NAPFA), we serve dentists all over the Pacific Northwest.

We empower our clients to live their vision.
We develop extremely strong relationships of trust with our clients
by deeply understanding their hopes, dreams and concerns.
We empower them to live their ideal lives by helping them align their financial resources with their life goals.
We then give them the best financial planning advice in their situation to reach their financial goals.
We monitor the status of their goals with them on a regular basis.
Through the entire process, we provide exceptional customer service.

Compensation & Benefits

- **Hours:** Full-Time, with the option of flexible hours to ensure work/life balance.
- **Pay:** Competitive and dependent on experience. Includes bonus & incentive potential & paid vacations.
- **Benefits:** Health Insurance & Paid Time Off, mentorship & career growth opportunities.

Interested in Applying?

Please submit your resume, cover letter and at least two references to

Apply@Freedom4Dentists.com