Client Services Associate
SagePoint Financial
Ellen Bylsma

Opportunity to assist in a financial services practice by providing client and office support to accomplish operational efficiency. Candidate must have critical thinking skills, be highly organized and interested in learning a complex and ever-changing industry. Bachelor's degree and 3-5 years of progressive experience in finance, or a related field required. FINRA Series 6 or 7 and/or Series 65 or 66 highly desirable, or willingness to obtain.

Responsibilities will be:

- Manage an operationally efficient organization while maintaining and implementing standard operating procedures
- Manage prospective client awareness marketing program
- Assist advisor with managing and maintaining client investment models
- Create and implement annual multi-touch marketing calendar and plan
- Host and communicate client events
- Schedule client reviews
- Confirm appointments
- Prepare for client meetings
- Coordinate prospect mailings
- Create reports and assist with selection of investment models

This is a great opportunity for a career minded person who is interested in advancing, learning and growing professionally. Part-time or full-time consideration (30-40 hours). Core hours of 9:00 – 4:00 with some flexibility. Compensation commensurate with experience.

Job Type: Full-time

Experience:

- Financial: 3 years (Preferred)

Education:

- Bachelor's (Preferred)

License:

- FINRA Series 6 or 7 and/or Series 65 or 66 (Preferred)

Work Location:

- One location (downtown Grand Rapids)

Benefits:

- Flexible schedule

Interested applicants should submit a cover letter and resume to Ellen Bylsma (ebylsma@sagepointadvisor.com)