KRUSE WOODS
FINANCIAL PARTNERS

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Krusewoodsfp.com

Job description:
We take a team approach to financial planning, offering a broader scope of experience that you won't find in any one person. Clients are our main priority, which is why we work to understand their unique circumstances and create a distinctive plan that provides a road map for their financial journey. We are looking for talented, innovative and driven people who believe they can help themselves, and our clients, create a better future.

Our opportunity:
We are driven by our purpose to champion every client's goals with passion and integrity. We support our employee strengths, guide their development, and invest in their long-term success. We hire optimistic, results-oriented, innovative, and adaptable people with the desire to help our clients and one another succeed.

What you'll do:
As a Client Service Specialist, you are the first impression to our clients. We expect each interaction to deliver value and a memorable service experience that will promote client loyalty. In addition to client involvement, the role will be responsible for helping a Financial Advisor with the daily needs of their business.
Duties include:

- Work closely with advisor to support client relationships
- Maintain and/or schedule client meetings
- Help plan and organize all client events
- Coordinate all client on-boarding including preparation of account paperwork, account opening, overseeing transfers and ensuring all supporting documentation is compliant
- Monitor and handle administrative client service issues ensuring the highest level of client satisfaction
- Maintain client CRM including scanning documentation and attaching to appropriate file
- Work with advisor to prepare for ongoing performance reviews
- Assist in implementation of marketing tools including presentations, newsletters, and email correspondence.

Qualifications:
We place a premium on high performance, quality service and the ability to execute.

- Work well in a team environment
- Customer service experience
- Positive attitude, enthusiasm, professionalism and strong work ethic with high level of integrity and ethics
- Proficient in Microsoft Office
- Ability to work 40 hours per week is preferred

Education/Experience:
Candidates are preferred to have customer service experience along with securities license but neither are a requirement.

Additional abilities:

- Computer skills
- Time management skills
- Organizational skills
- Oral and written communication skills
- Detail oriented
- Professional

Please direct all inquiries to Karri MacCluer at karri.maccluer@krusewoodsfp.com