Client Service Advisor

SAMPLE JOB POSTING (IPWM)

INTEGRATED PLANNING & WEALTH MANAGEMENT LLC

WHO WE ARE

We are a fee-only financial planning & wealth management firm serving optometrists and optometric practice owners nationwide. We are looking for a self-driven, compassionate, and knowledgeable Client Service Advisor. We're flexible on where you work: either in person (Carmel, IN), remote, or hybrid. We are authentic, genuine, fun, and very much "non-corporate." The image of a stockbroker, insurance agent, or Wall Street executive is about as far from who we are as a firm. Our core values align with the importance of family and work/life balance; we don't "live to work" but rather "work to live" and, within reason, will be flexible in knowing that "life happens"; we don't want to have our team choose between "work" and "family"—as long as the job at hand gets done.

Responsibilities include but are not limited to:

- Handle client-related requests and account service inquiries w/o advisor input that have been escalated from the Practice Manager (PM).
- For new clients, assist PM with data collection and input into financial planning software.
- Organize and analyze financial data received from new and existing clients.
- Perform case prep and communicate actionable items to lead advisor prior to client meeting.
- Formulate financial planning strategies for clients.
- Assist clients with the implementation of recommended and agreed-upon strategies.
- Generate reports and other deliverables for both client-facing and back-office needs.
- Ad hoc trading to satisfy client withdrawals and deposits.
- Additional support with other financial planning-related projects and services associated with the firm.

The following traits describe you and your essential skills…

- Incredible attention to detail and thorough follow-up: things falling through the cracks are like nails on a chalkboard for you.
- Strong interpersonal communication skills—you don't mind talking to people and they enjoy talking to you.
- Ability to rapidly refocus between different projects (this is usually incorrectly called "multi-tasking")—you're able to pick things up and put them down and it doesn't bother you.
- You look forward to providing authentic and compassionate service to client relationships.
- Embracing the mantra "if it's not documented in the CRM, it didn't happen" brings a smile to your face.
- You're comfortable using a PC or a Mac, but prefer a MacBook.
- Various apps in Office 365 are a layup for you.
- You get excited about "independent collaboration:" you relish the space and agency to work and solve problems independently but appreciate the value of a team approach.

Here's a small list of the things that you **WON'T** be doing…

- Prospecting for new business or relationships
- Researching the newest investment or wholesaler email that ended up in our inbox
- Building 75+ page antiquated financial plans
- Sitting at a desk waiting for the phone to ring
- Serving as the lead advisor's personal assistant

Experience requirements

- You have minimum 2 years of experience in a similar role
- No issues with a background check
- Series 65 or 66 licensed or CFP® professional

Compensation

We believe very strongly that "you get what you pay for" in life, talent being no exception. For a highly qualified candidate with experience, we are not shy of acknowledging that and rewarding it in turn. The salary range (open for discussion) is $65,000 – $85,000 with additional upside after 1 year. In addition, paid holidays & PTO (unlimited vacation begins in 3rd year), flexible work schedule, safe harbor 401(k), and professional training & development are also part of the package. If the candidate lives outside of Carmel, IN an allocation of resources to get set up remotely will also be included (standing desk, computer & monitors, other tech equipment, etc.). Health, dental, and vision insurance, if needed, can also be included into the comp package.

How to Apply

Interested candidates should send a cover letter and resume as a PDF along with a short video specifying what it is about this opportunity that is attractive to you. Don't be "corporate;" let your personality come out. Click the link below to apply, using "Client Service Advisor opening" in the subject line.

Apply to this position

For more information, you can visit our website by clicking the link below.

www.integratedpwm.com

Please note:
Our office is very busy, so please do NOT try to contact our team through any method other than submitting your resume, cover letter, and video as described above. All other attempts to reach our office will be ignored.