

## **Financial Services: Client Service and Operations Specialist**

Great Lakes Wealth – Northville, MI

**Job Type:** Part-Time or Full-Time

\$24,000 - \$50,000 a year. (Based on Hourly vs. Salary and Relevant Experience)

Come join a small, but fast-paced and fast-growing wealth advisory firm offering financial planning and asset management services to high net worth clients. This multi-faceted role is part client service and part operations & administration. The person filling this position will be cross-trained in both Client Service and Operations functions. This position is ideal for a well-organized, detail-oriented person who enjoys multi-tasking and working with both technology and people.

### **You will primarily be expected to:**

Enhance the client experience by providing exceptional client service, supporting Branch operational functions as needed, assisting in safeguarding client assets, and serving as administrative support to our Wealth Advisors. You will be responsible for understanding firm policies, procedures and digital capabilities that will allow you to interact with The GLW team, as well as, new and existing clients.

### **Responsibilities will primarily include:**

- On-boarding clients (generating initial paperwork, follow-up and progress monitoring)
- Appointment setting & scheduling
- Processing deposits and other client servicing forms
- Providing assistance in marketing initiatives, luncheons, seminars and client events
- Performing all basic office tasks including drafting correspondence and interacting with clients
- Providing support to Management and Advisors on special projects
- Fulfilling some receptionist and branch level duties
- Assisting with advisor transitions

\*As part of our team this individual must be flexible, self-motivated, and very quality-driven

### **Skills critical to success:**

- Strong computer skills and knowledge of Microsoft Office products
- Exceptional interpersonal and client service skills
- Detail orientated with superior organizational skills
- Team player with the ability to collaborate with others
- Ability to work in a fast-paced, evolving environment

### **Candidates should have:**

- High School Diploma/Equivalency, but Associate degree or higher preferred
- 2+ years industry experience
- Currently licensed & registered a plus, but willing to obtain industry credentials is essential
- Knowledge of Raymond James back-office & operations a plus, but willing to learn it is essential
- **Part-Time:** Hourly wage and hours worked are negotiable
- **Full-Time:** Salary of \$24k-50k, depending on current credentials, with room for growth over time