



**Client Service Specialist for Financial Advisory Firm Focused on Sustainable and Responsible, Impact Investing (SRI)**

Seeking a career administrative professional who wants the flexibility of a remote, home-based job and ability to leave it at the end of the day. The ideal candidate is a team player with a start-up mentality willing to take on any task; a people pleaser that demonstrates consistent follow-up while being extremely detail oriented and organized; a self-sufficient, self-starter who doesn't need supervision to get work done. If you have a strong work ethic and commitment to completing administrative tasks on time and done right the first time.

**Responsibilities:**

- Work with a team of 2-3 other client service support staff;
- Help develop systems and processes to simplify and standardize the business;
- Answer all inbound calls during business hours: screen solicitors, profiling prospects, troubleshoot client questions, schedule meetings or redirect to the appropriate person;
- Manage paperwork processes for opening accounts and moving money; following up regularly until confirming completion;
- Ensure timely implementation of client service requests and paperwork completion;
- Update clients and advisors regularly on status of service items to ensure they know things are on track;
- Tend to service cases that include meeting follow-up items;
- Schedule calls, web and in-person meetings for multiple financial advisors;
- Help manage office technological systems;
- Professionally respond to client inquiries regarding their accounts via email, web meetings, hard copy correspondence and phone;
- Assist with event planning for several client events per year;
- Prepare reports and documents for clients, as needed;
- Prepare occasional mass mailings;
- Assist with marketing and communications such as posting monthly blogs, sending out Mailchimp email, laying out the quarterly reports insert, and posting to social media
- Working remotely from home;

**Qualifications:**

- Must be able to write and speak professionally;
- Experience in financial services is helpful;
- Previous experience working with virtual teams preferred;
- Love of accuracy, order and attention to detail;
- Proficient and comfortable navigating technology;
- Personable and good communicator;
- Unparalleled ethics (background checks will be completed);
- Self-starter, proactive, problem solver

This position provides a competitive salary plus health insurance, team performance bonuses, 401k match, unlimited PTO policy and the possibility of future equity stake.