

Client Services Manager of Financial Planning Practice

Seeking a Client Services Manager for an established financial planning practice of 20 years in Minneapolis, MN. We are looking for someone experienced in financial administration with a strong customer service background to complete our team. The Client Service Manager will provide support for all account maintenance and activity - including trading functions, technical support, compliance obligations, etc. The candidate will have the opportunity to learn and develop the skills of running a business in the Financial Services Industry.

Education/Certification Requirements

- 4-year degree preferred
- 3-5 years of financial administration and customer service experience
- Series 7, 66 and MN Life and health licenses preferred or ability to obtain within 6 months

Qualifications

- Strong interpersonal skills required to develop team and client relationships
- Professional presence and excellent communication skills
- Proficiency with Microsoft Office, Salesforce CRM, Financial Planning Software, and Investment Trading Platforms
- Ability to anticipate client and financial planning needs in advance of meetings
- Ability to assess processes and make improvements in overall office management
- Client first, problem – solving attitude desired

Main Responsibilities

- Manage all new business processing and post appointment paperwork
- Provide account maintenance and activity including trading and transfers
- Monitor client accounts and outstanding orders
- Research and answer client questions relating to accounts
- Review and verify transactions and provide explanations to compliance as necessary
- Monitor client portfolios and cash management
- Assist clients with gathering tax data as needed
- Support Practice Manager and provide assistance if team member is absent

To learn more about Focus Financial, please visit focusfinancial.com. Apply now by submitting your cover letter and resume to careers@focusfinancial.com. Thank you for considering this position.