WEALTH MANAGEMENT

CLIENT SERVICE ADVSIOR

Summary of Essential Duties:

The Client Service Advisor is the primary point of contact for McKay Wealth Management clients. Having such frequent contact makes the Client Service Advisor a key contributor to client satisfaction and client retention, both of which are essential to growth in revenue and profitability. He/she will be responsible for delivering the firm's premium client service through direct client interaction, paperwork processing and behind the scenes coordination with other team members. This position requires knowledge of the core tenets of investments, financial planning, experience in a planning support role and the ability to interact with clients at a high-level. The Client Service Advisor demonstrates grace under pressure, a positive attitude and the ability to handle a heavy workload.

Responsibilities

- Serve as support contact for assigned client relationships
- Communicate regularly with assigned clients to provide advice/recommendations
- Independently conduct client meetings
- Provide high quality, high touch service to McKay Wealth Management clients
- Manage daily client transactions and inquiries accurately, within established deadlines, and in accordance with existing policies and procedures
- Research, follow-up and resolve client inquiries and problems through effective interaction with clients, product partners, branch/operations areas and other staff in a timely and professional manner
- Manage general account inquiries and maintenance, including but not limited to: transactions, holdings, balance, and address changes
- Coordinate and follow through on account inquiry, transaction and maintenance requests across products and services:
    - account opening and funding
    - transfer of securities
    - processing trades and other transactions
    - statement requests
    - tax reporting inquiries
    - support of online service

Knowledge, Skills, and Abilities

- Able to work both independently and as a team player with strong administrative and problem solving skills
- Ability to multi-task and exercise good judgment by recognizing urgency and prioritizing accordingly
- Ability to adapt to a rapidly changing business and technology environment
- Exceptional problem-solving skills

- Strong communication skills (verbal and written)
- High degree of confidentiality and latitude
- Proficiency with Microsoft Office Suite (Word, Excel and PowerPoint)
- Ability to learn company specific software and databases

Qualifications

- Bachelor's degree or equivalent financial services/banking industry experience required
- Series 7 and 66 licenses required for position, and preferred upon hiring, but must be obtained within 120 days of hire
- Client service experience preferred

Contact

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