Position – Client Services Associate

(Full-Time: Independent Contract Employment Offer (i.e. 1099))

About May Financial Planning

May Financial Planning is a family-owned financial planning practice, run by Dan May, Jason May, and Johno May. We aspire to provide our clients with personalized financial advice and the highest level of customer service. May Financial Planning is centered around ethics and family values.

You will succeed within this organization if you enjoy challenging yourself, working with a growing team, and helping to build on the firm's sound foundation to help it evolve and adapt with the industry.

Responsibilities

Overview:

The Client Service Associate delivers a wide range of critical client support to the advisor and helps to provide the resources and guidance our clients need to achieve their financial goals. Duties are varied and can include supporting the preparation of financial plans and reviews; organizing meetings; meeting follow up; responding to client inquiries and maintaining; processing new business and updating client files. The Client Service Associate will work under the direct supervision of the Financial Advisor.

This position is a full-time position; this assumes an average workweek of 40 hours. Members of May Financial Planning will be expected to work primarily onsite, with the flexibility to work remotely depending on advisors' schedule and workflow. This role provides the opportunity to grow within the organization.

Key Areas of Responsibilities:

- Interact with clients, process client requests, and answer basic client inquiries in a timely manner.
- Organize client meetings and related follow-up meetings.
- Coordinate the preparation of financial plans, annual or quarterly reviews and other ad-hoc client meetings materials.
- Prepare consolidated reports, meeting agendas, quotes and added services.
- Assist in processing all new business.
- Manage all details of clients, prospects, and vendors in CRM.
- Maintain accurate client data in client relationship management database, client fee billing and reporting systems.
- Commit to continuous education and professional development to remain current in industry issues, CRM, and compliance rules and regulations.
- Foster an environment of open, honest, and timely communications.

Qualifications

- 1-3 years of customer service or administrative support experience. Preferably in Financial Industries.
- Exceptional oral and written communication skills.
- Excellent follow-up and follow-through capabilities.
- Organized, meticulous, detail-oriented, and able to multitask.
- Able to exercise good judgment by recognizing urgency and setting priorities.
- Able to work independently with good problem solving, mathematical and time management skills.
- High degree of confidentiality.
- Proficient with Windows based software, including MS Outlook, Word, Excel, PowerPoint.
- Knowledge of NetX360, Redtail, and Advice Works preferred.

Disclaimer: This job description is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible job responsibilities, tasks, and duties. Responsibilities, tasks, and duties of the jobholder might differ from those outlined in the job description and other duties, as assigned, might be required.