Everence Services

Position Description

POSITION TITLE: Client Services Representative
REPORTS TO: Support Staff Supervisor
FUNCTIONAL AREA: Lancaster Core Market

POSITION SUMMARY

The purpose of this position is to provide exceptional client service and high-level administrative support to one or more Financial Advisors.

The Client Services Representative will serve both advisor and client with excellence and professionalism. The role involves a significant amount of work with financial data and confidential client information. It requires a high level of accuracy and attention to detail.

RESPONSIBILITIES AND DUTIES

<u>Client Services</u>

- Prepare for and follow up on client appointments, which may involve organizing appropriate files and necessary paperwork; creating and updating consolidated statements; and reviewing, processing and following up with paperwork as needed after appointment (same day or by advisor instruction)
- Utilize various software programs as needed to assist advisors in client appointment preparation and research (CRM, E-money, AMP, Albridge, LaserApp, OnBase, Straight-Through Processing, Morningstar, insurance quotes and illustrations, etc.)
- Manage client database to offer routine review appointments by phone, mail or email, with consideration to advisor recommendation, client classification system and client preference
- Schedule appointments and maintain advisors' calendars as requested
- Write and prepare correspondence, including emails and database notes, as needed or as directed by advisors
- Manage clients' required minimum distributions from retirement accounts
- Gather, prepare and complete client paperwork as needed
- Field incoming calls and walk-in appointments when advisors are not available or as needed
- Initiate and carefully document contact with clients as service opportunities arise
- Provide seasonal support to Employee Benefits Team, as needed

Administration

- Review and sort incoming mail for advisor(s) daily
- Track various statistics, account balances, application status and holdings as directed by advisors
- Prepare various weekly, monthly and quarterly reports
- Maintain client account (securities) and policy (insurance) files
- Provide back up for receptionist and other Client Services Representatives as needed
- Research and calculate cost basis for client holdings as needed
- Other related projects and duties as assigned by advisors or support staff supervisor
- Serve on core market and/or corporate committees as requested and approved by advisor and supervisor

QUALIFICATIONS

- At least three years' experience in a professional office support role
- Proficiency with Windows-based software and Microsoft Office Suite
- Consistently accurate with high attention to detail and organization
- Self-motivated with desire to take initiative
- Proven ability to independently think through challenges and design solutions
- Demonstrated client service focus
- Exceptional time management
- Excellent verbal and business writing skills

License(s)

- Must be able to obtain a Pennsylvania life and health insurance license, if required

SCHEDULE

- This is a full-time position.