Affiliate Advisor – Carlson Wealth Advisors

Client Service Administrator

Indianapolis, IN

At Carlson Wealth Advisors, an affiliate advisor of AdvisorNet Financial, we create a personalized financial roadmap built on trust and expertise to guide our clients toward their desired financial destination. We are looking to add a customer-focused, detail-orientated Client Service Administrator to our team located 15 minutes south of downtown Indianapolis.

The Client Service Administrator is the first person our clients see and speak to when reaching out to us. As a Client Service Administrator, you will deliver a wide range of critical client support to the advisor and help 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 and updating client files.

Position Responsibilities

- Interact daily with clients, process client requests and answer basic client inquiries in a timely manner. Address inquiries to appropriate areas.
- Proactively communicate with clients on a regular basis through a range of communications vehicles.
- 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.
- Discuss and organize follow-up steps with the advisor after client meetings.
- Prepare client investment applications including new account applications, process transfers of client accounts, provide daily tracking of project status and keep client informed of the progress of their accounts and any deposits.
- Create processes to aide in advisor and client organization.
- Manage all details of clients, prospects, and vendors in CRM.
- Populate and maintain accurate client data in client relationship management database, client fee billing and reporting systems.
- Order and maintain all supplies including forms, prospectuses, useful research information and office supplies.
- Coordinate mailings; process incoming mail.
- Maintain administration and relevant client service reporting and planning systems; manage relevant reporting of management and financial information for the client service department.

Required Skills and Experience

- 3+ years of experience in an administrative or support position, preferably with an investment management or advisory firm.
- Exceptional oral and written communication skills.
- Excellent follow-up and follow-through capabilities.
- Personable, approachable with a positive attitude.
- Organized, meticulous, detail-oriented, and able to multitask.
- Able to interact well with sophisticated, high net worth clients and all employees.
- Able to exercise good judgment by recognizing urgency and setting priorities.
- Professional attitude, demeanor, and appearance.
- Able to work independently with good problem solving, mathematical and time management skills.
- High degree of confidentiality.
- Proficient with Windows based software, including MS Word, Excel, PowerPoint.
- Work experience that demonstrates interpersonal and teamwork skills.

Location: Indianapolis, IN
Job Type: Full-time
Pay: $35,000.00 - $40,000.00 per year