Client Services Administrator 2

ANF Office: *130 Cheshire Lane, Suite 150, Minnetonka, MN*

About AdvisorNet Financial

AdvisorNet Financial has been an innovative leader in the financial services industry for over 60 years. We provide the services and support independent financial advisors rely on to operate their firms efficiently and competitively. Over the years we have developed a vast network which allows us to provide our 300+ independent advisors access to the support services and industry partners that advisors in large institutions enjoy without having to be part of a large institution. For more information, please visit us at www.advisornet.com.

You will be a great fit if you enjoy working with people and data in a very dynamic, fast-paced environment. Our group requires people to be friendly, outgoing, and to thrive in an environment working on and in the business at the same time.

Responsibilities

- Annual client review prep which includes Albridge Report, Annuity Statements, Life Insurance Statements
- Complete meeting follow-up and coordinate post-meeting requests including client paperwork and placings trades
- Process paperwork to open new accounts, distribution requests, obtain appropriate signatures, prepare documentation to send to client or home office to coordinate rollovers.
- Maintain all client and workflow related tasks and communications in Redtail
- Assist advisor with communication plan as needed
- Utilize available technology resources to assist with daily workflow (NetX360, Albridge, LaserApp, Advice Works, Redtail)
- Maintain the integrity of the CRM (Redtail)
- Recognize needs of client and make advisor aware of life events
- Assist in building comprehensive, individualized plans for clients and provide ongoing analysis of plans (Money Guide Pro)
- Team player inside CSA and Planner team as well as with the broader AdvisorNet team.

Qualifications

- 2 – 5 years of experience in Financial Services
- High level attention to detail
- Professional presence and communication skills
- Strong interpersonal skills required to develop team and client relationships
- Excellent follow-up and follow through capabilities
- Personable, approachable with a positive attitude
- Organized, meticulous, detail oriented, and able to manage multiple priorities

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.

Job Type: Full-time

Pay: $50,000.00 - $60,000.00 per year