Position – Senior Client Services Manager

Full time

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

Overview:
The Senior Client Services Manager will provide leadership and support in the management and coordination of client services and department operations. This position will support the Director of Retail to build collaboration between the planning and client service teams, critical to the highly personalized service we strive to provide for the clients of AdvisorNet Financial Partners.

Key Areas of Responsibilities:

- Coach, train and educate Client Service Administrators to ensure clients and Advisors receive VIP service.
- Back up and support Client Services Administrators and advisors to ensure clients receive VIP service.
- Collaboratively support and implement operations for efficiency and consistency in process across departments and teams including administration, compliance, and marketing.
- Coordinate the adoption of new technology and efficiencies to the AFP planning team to include and not limited to Redtail, Albridge, Constant Contact, MyRepChat, or other applications.
- Client communication/marketing support- Coordinate with Director of Retail to implement and keep on time scheduled marketing strategies.
- Manage department level reporting including commissions, production, goal metrics and additional reporting as requested by leadership.

QUALIFICATIONS

Required attributes:
You will be a great fit if you are positive, driven, creative problem solver, and devoted to being a team player. We always strive to over-the-top customer service and maintain a professional demeanor.

- 3-5 years of experience in client services or operational management in the financial services industry.
- Series 6 and 63 licensing, Series 7 and 66 preferred.
- Excellent knowledge of Microsoft suite including Word, Excel and PowerPoint.
- Strong history of excellent service to both team members and clients, project prioritization, and a high level of maintaining organization of multiple projects.
- Excellent communication skills both written and verbal, with a commitment to providing VIP service to clients and team members.

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.