



Job Title	Client Service Associate
Reports to	Andre G. Marshall – CEO, Financial Advisor
Position Type	40 Hours per week

Faith | Trust | Integrity | Relationships

About Us: AGM Financial Group is an innovative leader in the financial services industry and has been in existence for over 30 years. AGM provides financial planning and investment services to high net-worth professionals and business owners.

Duties and responsibilities: This position will be primarily responsible for the technical aspects of assembling a client’s financial plan and progress report. AGM Financial Group believes in using cutting-edge technology – therefore, experience with technology is a must. This position provides exposure to all facets of the financial planning industry including interest rates, growth, taxes etc.

Investment Related Duties:

- Provide in-depth analysis of client data while utilizing financial planning tools and portfolio analysis. In time, this position will need to understand how all pieces of a financial plan fit together.
- Maintain client communication and data in RedTail: Client Record Management system.
- Perform trades with accuracy.

Client Service-Related Duties:

- Complete all paperwork (client accounts, distribution, roll-over paperwork) with precision and accuracy.
- Ensure all data for client meetings is accurate and timely.
- Complete all ‘follow-up’ work from clients’ meetings: edit and send meeting summary notes to client.
- Prepare files for clients and prospective clients.
- Prepare/ print client account information and submit documents within guidelines.
- Marketing efforts, which includes working on the website, social media, and other platforms.

Qualifications:

- Great passion for the investment/financial planning industry combined with a constant desire to learn.
- Needs to be tech savvy. Microsoft Word and advanced Excel skills are a must.
- Must be detail oriented, combined with ability to think critically about a problem.
- Strong math and analytical skills
- Excellent organization and time management skills
- Proven track record of managing multiple priorities and with exceptional follow through.
- Ability to work independently, interdependently and take initiative.
- Excellent oral, writing and editing skills.

Compensation:

- Based on qualifications.