Position – Client Support Specialist

Full time

ABOUT STERLING RETIREMENT RESOURCES

Sterling Retirement Resources has been creating clarity through a holistic approach to financial guidance since 2008. We are a dynamic team that provides the confidence to our clients to live their best lives through our comprehensive approach and out of the box thinking. Sterling Retirement maintains its independence and intimate client experience, while having the dedicated support and service from industry leading financial services firms.

You will be a great fit for our team if you enjoy working with people and data in a very dynamic, fast-paced, fiduciary environment. Our group requires people to be collaborative, team oriented and client centric.

RESPONSIBILITIES

Overview:

The Client Support Specialist is a unique position that combines paraplanning, investment coordination, team collaboration, and client interaction in the same role. The Client Support Specialist is responsible for building comprehensive, individualized financial plans for clients and providing ongoing analysis of those plans. This role is also responsible for working closely with Sterling Retirement Resources' investment management arm (Portfolio Partners) to service, monitor, and coordinate financial transactions on behalf of our clients. The Client Support Strategist will also work closely with other team members in preparation for, during, and after client meetings as needed.

****This is a great opportunity for someone who just graduated and would like to get their foot in the door and grow with our organization to make a career in the financial services industry! This position includes the potential opportunity to grow into a client facing Financial Planner role in the future.***

Responsibilities:

- Prepare/update financial plans for new and existing clients. Financial plan prep includes retirement planning, college funding, risk management, mortgage analysis, budget planning, cash flow analysis, estate planning, etc.
- Proficiently gather and consolidate information from financial plans and written documents to assist in building recommendations and meeting preparation documents consistent with the Financial Advisors' needs for client meetings.
- Maintain and update MoneyGuidePro software system for new and existing client financial plans.
- Participate in client meetings to recap action plans and follow-up with clients pre/post meeting to make sure all action items are completed/scheduled.
- Work strategically as a liaison with Sterling's investment team to manage the relationship and direct investment activities.
- Communicate regularly with clients in preparation for upcoming meetings and post-meeting follow-up. Define problems, collect data, establish facts, and draw conclusions.

QUALIFICATIONS

You will be a great fit if you are strategic, client centric, and a team player. We strive to achieve superior client service and client experience while maintaining a professional demeanor.

- Associates or Bachelor's degree in finance, business or related field.
- Experience preferred, but not required.
- Series 7 and 66 securities registrations, or ability to obtain within a set timeline.
- Attention to detail, excellent organization and time management skills.
- Ability to manage multiple priorities and handle frequent interruptions.
- Proficiency in Microsoft Office and comfort learning other technology platforms as required.

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.