Client Service Administrator

(full-time, regular employment)

About Peak Advisory Group

Peak Advisory Group LLC is a small, Denver-based financial advisory practice focused on investment management and financial planning for individuals, accompanied by tax preparation services and life insurance planning. We are looking for a detail-oriented assistant to support two financial advisors primarily with back-office work along with other miscellaneous business items as we focus on formalizing our service model to take the firm to the next level. For more information, please visit us at https://www.peakadvisoryco.com.

Responsibilities

Key Areas of Responsibilities:

- Interact with clients, process client requests and answer basic client inquiries in a timely manner. Address inquiries to appropriate areas.
- Organize client meetings and related follow-up meetings.
- 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.
- Assist in processing all new business.
- Manage all details of clients, prospects and vendors in CRM
- Maintain accurate client data in client relationship management database, client fee billing and reporting systems.
- Ensure system backups are completed on routine basis.
- Commit to continuous education and professional development to remain current in industry issues, CRM, and compliance rules and regulations.
- Act as point person for maintenance, mailing, shipping, supplies, equipment.
- Manage office supplies inventory and place orders.
- Identify opportunities for process and office management improvements, design and implement new systems.
- Assist with CRM updates, run and distribute regular reports and maintain high level of data integrity.
- Answer phones
- Greet advisors, clients, visitors, and guests; determine the purpose of each person's visit and direct or escort him/her to the appropriate location.

Qualifications

- Bachelor's degree in Business, Finance, or a related field – or experience in lieu of degree.
- 2+ years of experience in an Admin type role, preferably in the Financial Industries
- Excellent follow-up and follow-through capabilities
- Able to exercise good judgment by recognizing urgency and setting priorities
- High degree of confidentiality
- Must be proficient with Microsoft Office.
- Must have exceptional attention to detail and strong critical thinking skills.
- Strong organizational and time management skills, and ability to prioritize.
- Must be a self-starter, driven and show proven ability to work independently.
- Excellent communication and interpersonal skills.
- Strong problem-solving skills and analytical abilities.

To apply: Send your resume to hr@advisornet.com

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.