MEATH
WEALTH ADVISORS

Position – Client Services Administrator 2

Full time

About AdvisorNet Financial

Meath Wealth Advisors is a boutique holistic wealth management firm in Minneapolis. We have clients that have been with us for over 30 years and serve families across 3 generations. We bring our unique backgrounds in health and wellness to everything we do, helping our clients feel more clarity and ease around their finances and in their life. We believe this helps them make the impact they want to in the world and community. We also have a passion for sustainable investing, and doing our part to help make a positive impact in our environment. For more information, please visit us at www.meathwealthadvisors.com.

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

Responsibilities

Overview:
To provide VIP service to the clients and Advisors of Meath Financial Group.

Key Areas of Responsibilities:

- Annual client review prep which includes Orion 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 Salesforce
- Assist advisor with communication & marketing plan
- Utilize available technology resources to assist with daily workflow (NetX360, Orion, Docu-pace, Advice Works, Salesforce, Egynte)
- Maintain the integrity of the CRM (Salesforce)
- Recognize needs of client and make advisor aware of life events
- Review & edit client correspondence for Advisors, if needed

Qualifications

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

Required attributes:

- 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

What We Offer

We are looking for someone who fits our culture, and is excited to bring fresh ideas, a creative spirit, and a strong passion to help others live with abundance! As noted above we are a small company and are looking for someone who is excited to grow with our firm. Since we are small, we are also looking for someone who likes working independently and appreciates the flexibility that a boutique firm provides. We will help you through your career building process and guide you along the way as you build your own path.

- Competitive base salary
- Bonus potential
- Retirement matching
- Health benefits
- Fast-paced, entrepreneurial culture

* Flexible work environment
* Half-day Fridays from May 15th through August

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.