

**Client Services Administrator**

AdvisorNet Financial Partners Minnetonka, Minnesota, United States (On-site)

AdvisorNet Financial gives independent financial advisors the freedom to focus on their business by offering industry expertise and operational support so they can excel in their practice. Building a strong and respected reputation takes time; AdvisorNet Financial has been helping independent financial advisors serve their clients for more than 60 years and is continually working on building a sustainable firm for the next 60+ years.

We are deliberate and self-reflective about the kind of team and culture that we are building, seeking people that are not only strong in their own aptitudes but care deeply about supporting each other's growth, and building in person relationships.

**Company Culture** is at **Our Core**.

Our Guiding Principles are more than just words, they're a way of life. We know that companies with a strong culture & a higher purpose perform better in the long run.

Do our **Guiding Principles** speak to **you**?

* Always Independent. Never Alone.
* Better Together
* Responsiveness and accessibility
* VIP Experience
* Dedication. Trust.
* Dependability. Focus.
* Substance over surface
* Truth over harmony
* One team. One mission. One standard.
* Mission first, people always
* Upward and onward
* Measure twice, cut once
* Meaningful for them versus convenient for us
* Create the solution, not the problem
* Above the line

We are hiring a talented **Client Services Administrator**professional to join our team. If you're excited to be part of a winning team, AdvisorNet Financial is a great place to feel supported and grow your career.

***Overview:***

To provide VIP service to the clients and Advisors of AdvisorNet Financial Partners team.

**Key Areas of Responsibilities:**

Prepare meeting prep for new clients and well as annual reviews

* Annual review prep may include Albridge 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 Redtail
* Assist advisor with communication plan as needed
* Utilize available technology resources to assist with daily workflow (NetX360, Albridge, LaserApp, Advice Works, Redtail)
* Maintain the integrity of the CRM (Redtail)
* Recognize the needs of clients and make advisor aware of life events
* Assist in building comprehensive, individualized plans for clients and provide ongoing analysis of plans (Money Guide Pro)
* Develop projections for retirement accumulation and retirement income streams, college funding, debt elimination, mortgage analysis, budget planning, cash flow analysis, pension maximization and estate planning (Money Guide Pro)
* Aide advisor in preparing MorningStar Reports and/or work with Portfolio Partners to develop recommendations for advisory accounts
* Team player inside CSR and Planner team as well as with the broader Advisornet team.

**Qualifications**

* 2 – 5 years of experience in Financial Services
* Positive Leader amongst peers
* You value accuracy and take full ownership of mistakes made
* 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

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

*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.*