Client Service Financial Administrator

Full or Part-Time

Financial Freedom for Dentists LLC

☑ Are you a detail-oriented, tech-savvy professional who thrives on organization and client service?

☑ Do you enjoy helping people achieve financial freedom with time-tested principles of financial planning and investment management?

☑ Are you a proactive problem-solver, who works with numbers and would enjoy supporting a team of Certified Financial Planner(TM) professionals as a fiduciary (always committed to the best interests of each client)?

Why Join Us?

- **Flexible Schedule & Work/Life Balance:** More than just a good idea—it is the way we work and live in our family-friendly team in Snoqualmie, WA (exit 25 off I-90).
- **Integrity & Impact:** Work in a fiduciary role where trust, expertise, and communication drive everything we do.
- **Growth & Career Development:** Your input matters, and your contributions directly impact our clients, operations, and company growth.

Key Responsibilities:

As fiduciaries serving our clients with a high level of ***trust, communication*** and ***expertise***, a Client Service Administrator plays a vital role acting as the "face" of our firm and as part of the following team functions:

1. Client Services

- Support Financial Advisors with Client Service tasks, including meeting prep, reporting, account maintenance, follow-up and tracking as assigned.
- Leverage time proactively to implement efficiencies such as digital workflows, etc. (administration of accounts, including processing investment paperwork opening investment accounts and overseeing investment transfers, placing trades, completing & submitting custodian, and client paperwork accurately via mail or DocuSign, following up with clients, communicating with the investment custodian, and resolving any issues that arise in real-time.

- Act as the “face” of our firm, communicating effectively with clients over the phone and by email to resolve any outstanding issues of administering and transferring accounts or in the paperwork process.
- Maintain accuracy, completeness, and integrity of client data within our client relationship management system. Verify client accounts are established and transferred correctly. Master client on-boarding process.
- Provide general office support and organization for the business, including basic office responsibilities: answering phones, scanning, office organization to improve efficiency of office procedures and processes on the operations side of the business.
- Help maintain the advisors’ calendars. Initiate phone and email follow-ups to schedule meetings for clients.
- Handle any other tasks within an administrative capacity, taking charge to organize and create new systems and processes to improve efficiency.

2. COMPLIANCE

- Play a key role assist & coordinate Compliance efforts of the firm, supporting the Chief Compliance Officer as an “Compliance Implementation Expert:”
    - Handle compliance updates, follow-up and trackers in meetings with each client.
    - Proactively ensure completion and accuracy of specific tasks and projects as assigned-- using Docusign, building templates for efficiencies or setting up digital workflows in Schwab, etc.

3. GROWTH & ENGAGEMENT

- Support Lead Generation & Onboarding efforts with specific tasks as assigned, such as help set up Speaking Opportunities; follow-up, write draft communications; support with details and follow-up. Manage lists, cold calls, contacting, monthly email communications, etc.
- Support Marketing & Communications by learning to publish, finish, edit or post articles, presentations, or materials.
- Make Travel Arrangements for advisors
- Arrange for booths, making reservations, compiling Marketing Materials

4. FINANCE

- Assist with finishing, printing, and using portal for Billing & QPRs

5. FACILITIES

- **Facilities**: Ensure office organization; ordering or suggesting orders of supplies needed, watering plants, ensuring an optimal environment.

6. TECHNOLOGY

- Assist with specific tasks or projects as assigned relating to phone system, computers or software.

Qualifications:

- Highly organized, detail-oriented, and process-driven with strong problem-solving skills.
- Proficient in Excel, Outlook, Word, CRM software, and comfortable with technology.
- Series 65 certification (or willingness to obtain within 6 months).
- Strong communication skills and a proactive, team-player mindset.
- Ability to multitask, prioritize, and work independently in a fast-paced environment.

Compensation & Benefits:

- **Salary:** Starting at $27+/hour (DOE) with bonus potential.
- **Benefits:** 401(k) matching, health/dental/vision insurance, PTO, paid training, and professional development opportunities.
- **Schedule:** Full-time or part-time with flexible hours.

Join Financial Freedom for Dentists, a premier fee-only RIA firm empowering dentists to achieve financial freedom.

Apply Now: *Send your resume, cover letter, and references to Apply@Freedom4Dentists.com.*

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