CLIENT SERVICE FINANCIAL ADMINISTRATOR

DESCRIPTION

Grow with us! Join our team to be an integral part of a premier, fee-only Financial Planning & Registered Investment Advisory (RIA) Firm serving Dentists in the Pacific Northwest. You will serve a vital role meeting the needs of our clients, helping to manage day-to-day operations in our beautiful Snoqualmie office (right off I-90, 25 miles East of Seattle). As fiduciaries sworn to act in our clients' best interest, we help our clients live their ideal lives by aligning their financial resources with their life goals. If either directing operations or becoming a CFP® Professional interests you, and if you have a strong work ethic, are detail and process-oriented, with strong computer skills and a passion for serving clients with the highest integrity, we want to work with you!

RESPONSIBILITIES

- 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.
- Support Financial Advisor(s) in 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 and communicating with the investment custodian and resolving any issues that arise in real-time.
- 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 for the business, including basic office responsibilities: answering phones, scanning, office organization etc.
- Help maintain the advisors' calendar. Initiate phone and email follow-ups to schedule meetings for clients.
- Organize the office to improve efficiency of office procedures and processes.
- Handle any other tasks within an administrative capacity, taking charge to organize and create new systems and processes to improve efficiency.

QUALIFICATIONS

1. Highly organized, process-oriented, and accurate with the ability to follow through and maintain close attention to detail.
2. Series 65 Certification desired, and a willingness to receive certification within 6 months of hire date. Knowledge of key financial, investment and risk management concepts and experience working in an investment firm helpful.
3. Strong proficiency in Excel, Outlook, Word, and CRM software and extremely comfortable computer skills & utilizing technology.
4. A passion for serving clients with the ability to solve problems and anticipate client needs.
5. Superb verbal and written communication skills, especially the ability to listen and empathize with clients.
6. Administrative experience with ability to communicate and work well with others.
7. A self-starter with time management skills and ability to work with little supervision.
8. Ability to efficiently task switch and operate on tight timelines.
9. A team player who is highly flexible, collaborative, responsive and proactively engaged in building relationships.
10. Dedicated to highest integrity and maintaining confidential information.

Company Overview

Financial Freedom for Dentists LLC provides comprehensive fee-only financial planning and investment management for Dentists and their partners. We empower clients to reach their goals of financial freedom using an investment management philosophy based on academic research and evidence-based results. After over 25 years serving hundreds of clients all over the nation, Nate Ricks, a CFP® Professional and NAPFA Registered Financial Advisor, established Financial Freedom for Dentists in July 2019 as a Registered Investment Advisory firm, an SEC Investment Advisor. When speaking with anyone claiming to be a "financial advisor" a key question to ask is "Are you a fiduciary?" Not all that call themselves "financial advisors" are held to the fiduciary standard. However, at Financial Freedom for Dentists, we take pride in observing this standard. Now with an established loyal client base, we are uniquely positioned to grow to serve more clients throughout the Pacific Northwest.

Our Vision:

We empower dentists to achieve financial freedom.

Compensation & Benefits

Hours: Part-Time or Full-Time; Option of Flexible Hours to Ensure Work/Life Balance.

Pay: Competitive & Dependent on Experience. Bonuses & Incentive Potential.

Benefits: Health & Dental Insurance, Paid-Time Off, 401(k), Mentorship & Career Growth Opportunities.

Interested in Applying?

Please submit your resume, cover letter and at least two references to

Apply@Freedom4Dentists.com

Financial Freedom for Dentists LLC
34627 SE Swenson Dr. Suite 100
Snoqualmie, WA 98065
(425) 888-1911