Client Service Administrator
Career Opportunity

WealthPoint Advisors provides fee-only wealth management and financial planning services to high net- worth individuals, retirement plans, corporations and non-profit organizations. We are located in Indianapolis, IN and are looking to add a committed and driven individual to our growing firm.

Position Description

A Client Service Administrator provides support to advisors and clients to deliver a superior client experience. This includes preparing reports for internal and client meetings, communications with custodians, monitoring of office operations, and other special projects or problem solving to support the needs of advisors.

Duties and Responsibilities

The Client Service Administrator can expect to focus in the following areas:

- Deliver superior client service – prepare, submit, and follow up on processing paperwork, resolve inquiries and escalate cases when appropriate, troubleshoot problems, answer incoming client calls professionally, friendly and hospitable guest reception
- Administrative support for advisors including client electronic file, CRM, and Portfolio Management system maintenance, financial plan data management
- Proactively communicate with client's service requests
- Work directly with custodians to open and service accounts
- Prepare statements and reports for client meetings
- Execute special projects and problem solve issues for advisors and clients

Qualifications

The Client Service Administrator position typically requires the following qualifications:

- Bachelor's Degree from an accredited college or university
- 1-3 years of experience in the investment, finance or accounting field preferred
- Series 65 License in good standing
- Proficiency with MS Word, Excel, PowerPoint and Outlook
- Highly detail-oriented, accurate, organized, able to set priorities, diligent on follow through
- Manage deadlines and multiple responsibilities
- Excellent time management
- Strong written and verbal communication skills
- Self-starter, takes initiative, proactive, and resourceful
- Able and willing to learn new software with nominal help
- Team player, collaborative, able to work closely with others
- Desire/ability to work successfully in a small company environment; reliable and dependable

Salary and Benefits

Pay/benefits are competitive based on industry standards. Benefits include: 401(k) with company matching program, paid vacation, paid holidays. Partial and/or full financial support will be provided for professional accreditation/continuing education requirements and other education/training opportunities.

For confidential consideration, please forward your resume to:
WealthPoint Advisors, 8335 Allison Pointe Trail, Suite 135, Indianapolis, IN 46250, Attention: Lynn Thompson or lthompson@wealthpointadv.com.

WealthPoint Advisors, LLC is an Equal Opportunity Employer