

Financial Sales Assistant

We are a busy Financial Firm seeking a full-time Financial Assistant to help support the CEO.

This role is a non-sales role, for a smart, highly energized, professional that thrives in a busy environment.

A few essentials to be considered for this position: **smart, quick to learn new things, computer savvy, resourceful and dependable.**

Essential Duties and Responsibilities (Additional duties may be assigned):

Perform general administration and support functions for the office as required
Organize, coordinate, and maintain client paperwork
Call clients and prospects to schedule appointments
Attend events both day and evening and provide support 2 to 4 times per month
Correspond with clients to complete new accounts, asset transfers, and other forms
Handle routine matters for client accounts including processing name and address changes, account applications and bank authorizations, answering client questions via telephone and face to face
Research and resolve client service problems for errors as needed
Record all transactions on appropriate logs, set up client files and obtain necessary information

The Ideal candidate will possess the following skills:

College level courses in business/finance preferred, if neither of those apply, we just need someone smart that has a can-do attitude!

Ability to communicate with co-workers, clients and various business contacts in a professional manner
Ability to investigate, research, and resolve problems and concerns, maintain confidentiality
Ability to make rule-based and analytical decisions
Ability to organize, prioritize and handle multiple tasks, paying attention to detail and meeting deadlines
Ability to take complete and accurate notes, with excellent written and verbal communication
Skill in operating various office equipment including personal computer, fax machine, copier, etc.
Skill in utilizing various software packages such as Microsoft Office & Outlook

Benefits: Paid Holidays, Paid Vacation/PTO, 401K, Medical

For more information, please contact Nichole Demsky, nichole@bangerterfinancial.com