



Support Specialist

Job Description

The Support Specialist is a position that provides technical and operational support for the financial advisor team at Financial Fitness. This is an excellent opportunity to join a growing firm where you can gain valuable first-hand experience in a collaborative environment. Successful associates will have the opportunity to advance and take on more responsibility within the practice.

Duties and Responsibilities:

- Assist the financial advisor team with client service, including scheduling and preparing for client meetings
- Compiling client financial information and populating data in financial planning software
- Assist in the analysis of client objectives and development of planning strategies
- Support advisory team in the preparation and fulfillment of client applications and forms
- Work with the Financial Fitness team to continue to develop, enhance and/or refine the company's procedures and policies

Desired Skills and Experience

- 1-3 years relevant financial planning industry experience preferred
- Excellent written and oral communication skills
- Client-centric with a team mentality
- Ability to multi-task and manage time effectively
- Detail-oriented, analytical, and accountable

Qualifications

- Bachelor's Degree from an accredited college or university (required) with a major in Finance or business-related concentration preferred
- Demonstrated desire, progress toward, or obtainment of business licenses (Series 7, Series 66, Life and Health License) and/or professional designations (ex. CFP, ChFC, CeXP, etc) a plus
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook

Salary and Benefits:

- Pay/benefits are competitive based on industry standards
- Bonus eligible
- Benefits including 401(k)/profit sharing plan, health insurance, disability/life insurance, paid holidays and vacation
- Partial and/or full financial support for professional accreditation/continuing education requirements. If applicable; support amount will be determined by management each year

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