Service Advisor

Job Description:

Amicus Financial Advisors is a financial planning firm focused on providing relief to personal injury victims and their attorneys through comprehensive financial planning by offering empathetic in-house services for the transition from pre-settlement to post-settlement life.

Our firm is at a critical point of growth and we are looking for a full-time Service Advisor to join our growing team. This position will handle a wide range of important duties, including preparing financial plans, helping with day-to-day operations, new account analysis, paperwork, and will have the opportunity to prepare for, lead, and follow up on new client financial planning meetings.

This role also has the benefit of working with all the Partners and employees of the firm with the opportunity to develop a wide range of experiences and skills in a collaborative approach to serving clients.

Responsibilities:

- Comprehensive financial planning services
  - Prepare for and lead client meetings
  - Take notes, and prepare follow-up tasks for client meetings
  - Prepare financial plans using MoneyGuidePro/RightCapital financial planning software
  - Prepare tax planning projections
  - Analyze other areas of client financial plans, such as: investments, government benefits, retirement planning, education planning, cash flow/debt, etc.
  - Research potential answers to client questions

- Serve the needs of clients
  - Assist clients with account applications and custodial paperwork
  - Execute client-specific tasks (e.g., placing trades, transferring money, etc.)

- Support firm-wide operations
  - Generate investment reports, handle client cash flow needs, and assist with portfolio rebalancing
  - Assist in executing firm compliance program and related tasks
  - Support in performing other administrative tasks as needed (e.g., answer phones, prepare newsletters, scan documents, deposit checks, process wires, etc.)

Qualifications:

- Excellent written and verbal communication skills
- Proficiency in performing detail-oriented tasks
- Self-motivated, driven, and proactive in completing assignments
- Demonstrated ability to think critically and solve problems
- Enthusiastic personality and positive attitude
- Honest and ethical approach to work

- Financial designation preferred: CFP, CFA, CIMA
- Securities certification: Series 65 or 66
- Bachelor degree in related field

Technical Qualifications (preferred):

- Proficiency in using customer relationship management (CRM) software, such as Wealthbox, Salesforce, Zoho, or Pipedrive to manage client data and communications.

- Strong computer skills and proficiency in Google Workspace and Microsoft Office suite.

- Experience with project management software, such as ClickUp or Asana, to manage tasks and projects.

- Experience with document management software, such as Adobe Acrobat and Docusign.

If you enjoy working in a supportive and collaborative environment where ongoing learning and development are highly valued, then we encourage you to apply for this exciting opportunity!

Employment type: Full time. Specific hours are flexible.

Experience: While not required, 1-4 years experience with an RIA or other financial services company is preferred. Preference is given to candidates who are enrolled in a CFP® course of study or have passed the CFP® exam.

Salary: Based on experience

Benefits:

- SIMPLE IRA
- Accrued sick leave, paid stock market holidays, and birthday
- Flexible, family-friendly scheduling options
- Client-facing
- No sales responsibility required (i.e., no new client quotas, awkward family sales calls, etc.)
- Work with a wonderful, appreciative clientele. Opportunity to really make a difference in people's lives that have in many cases fallen on hard times.

Core Values:

Comprehensive Expertise: As Certified Financial Planners(™) professionals and attorneys, we are equipped to handle a wide range of financial planning and tax planning tasks, thereby providing a complete solution to our clients.

Client-Centered Approach: Our services are designed around the unique needs and circumstances of each client. We are committed to working closely with each client to maximize their financial security.

Trustworthiness: We strive to build enduring relationships based on trust with our clients and those who refer clients to us. Our reputation is built on consistent performance, integrity, and genuine concern for our clients' welfare.

Education and Empowerment: We believe in empowering our clients through knowledge. We not only provide financial planning services but also educate them about their choices and the impact of these decisions.

To Apply: Please send PDF cover letter (required) and resume to: Jenny@AmicusPlanners.com