Director of Client Services

Email resume to KaNeil Menlove: **kaneil@paragonwealth.com**
Desired Start Date: ASAP

Job Description – This associate's primary responsibility will be to deliver extraordinary client service. This associate must be knowledgeable, professional, caring, and genuinely interested in making sure our clients have a world class experience at Paragon. They are responsible to constantly upgrade, streamline and increase the effectiveness of our office systems.

Knowledge, Skills & Abilities:

Required:
Bachelor's Degree or currently working on a Bachelor's degree
Proactive work ethic
General knowledge of the financial industry
Excellent interpersonal skills, attitude, and a team member mentality
Extraordinary client service orientation
Superior organizational and time management skills including a strong attention to detail
Outstanding writing skills
Good problem solving skills
Ability to handle multiple tasks

Desired but not required:
Experience with financial software such as:

- Money Tree
- Orion Planning
- Orion
- Wealthbox
- Riskalyze
- MyRepChat

Experience with either Schwab Advisor Center or TD Ameritrade's Veo One
Knowledge of financial planning and investing
Experience coordinating and planning events

Responsibilities & Activities including, but not limited to:

Client Service:

- The first person to address all client concerns and correspondence
- Maintain accurate and completes notes and history of all actions for communication with each client
- Develop, mail, and analyze annual client satisfaction survey
- Deliver concierge services to all clients based on service level (A, B, C, D):
    - Coordinate all gifts and cards – birthday, anniversary, Christmas, and annual gift.
    - Random acts of kindness – congratulations, and get well.

  - Make quarterly contacts and notations in Wealthbox
  - Schedule annual client meetings around client anniversary
- Initiate, process and follow through to completion all new accounts
- Manage all alerts and correspondence from Schwab and TD Ameritrade
- Process account transfers, contributions, distributions or journals
- Process beneficiary, address, registration, and any other changes on investor accounts
- Process and follow through to completion all closed accounts
- Mail privacy policy once yearly
- Maintain email and mail list for all clients
- Annually verify RMDs have been taken
- Annually complete a Client Allocation Audit
- Complete a Client Classification Audit

Financial Planning:
- Input data into financial planning software (Orion Planning)
- Using Riskalyze to assess risk tolerance levels
- Analysis of retirement and financial plans for clients
- Sit in on appointments – retirement plans and other meetings

General Office:
- Responsible for answering all incoming phone calls
- Greets clients when they visit the office
- Manages calendars and schedule appointments
- Manages all electronic and paper files and is responsible for all scanning and filing of client documents
- Manage, optimize and update software including Wealthbox and Orion
- **Do whatever is needed to allow the principals to focus on their priorities.**
- **Develop and maintains written systems (blueprints) for all of the above listed responsibilities.**