Foster & Motley

FOSTERING LIFE'S WEALTH

Client Service Specialist (Administrative Assistant), Cincinnati, OH

We are a fee-only wealth management firm. Our mission is to assist clients in achieving their financial goals. We provide comprehensive financial planning and ongoing investment management. Our hallmark is a highly personalized approach, focused on the unique goals and needs of each client. We offer direct personal service through our exceptionally well qualified, seasoned professionals. Our employees are highly experienced, service oriented, and scrupulously honest. Our compensation system is designed to guarantee employee focus is on the client, not "production" or internal competition.

Position Summary:

Assist with client related financial planning and investment management activities, including interacting directly with clients (primarily by email & phone) to respond to their questions and administrative needs, while exercising a high degree of confidentiality and initiative. This is a full-time position.

Essential Functions:

- Establish, prepare, and maintain a variety of files, and documents.
- Maintain control of matters in progress and follow up to ensure actions are completed.
- Compile regular and special reports selecting data from various sources.
- Open, maintain and service client accounts.
- Draft correspondence.
- Make arrangements for meetings and conferences.
- Coordinate office functions with other departments.
- Perform other such duties as may be assigned.

Knowledge, Skills, and Abilities:

- General knowledge of office protocol and procedures.
- Organized and detail oriented.
- Excellent communication skills – oral and written.
- Ability to work independently and within a team environment.
- Customer service mentality.
- Dependable, and personable.
- Resolve situations using sound judgment.
- Demonstrate ethical conduct and confidentiality.
- Ability to utilize computer programs effectively.

Qualifications:

- College degree is preferred.
- Thorough knowledge of Microsoft applications; Word, Excel, Outlook is essential.
- Minimum of 5 years client service experience - within the financial services, legal, or insurance industries is a plus.
- Experience with Customer Relationship Management (CRM) systems and Document Management Systems (DMS) is a plus.

How to Apply:

Submit a cover letter, and resume to:

Larry Bernhard
careers@fosterandmotley.com

Foster & Motley, Inc.
7755 Montgomery Road, Suite 100
Cincinnati, OH 45236
(513)561-6640
Website: www.fosterandmotley.com