Position Description

Title: **Client Service Representative (CSR)**
Reports to: Julie Shepherd – Client Service Manager
Benefits: Yes
Status: Non-exempt

Are you passionate about making a difference in people's lives while thriving in a team-centric environment?

Who is SYM?

SYM Financial Advisors serves as a trusted expert to our clients, using our team's deep knowledge and vast experiences to be an advocate and help them achieve their vision of financial success. We are seeking a responsive, motivated, and detail-oriented team player to join our firm. In the role of Client Service Representative, you are at the forefront of the client experience, working with advisory teams to deliver exceptional service by supporting clients' day-to-day needs.

To help you reach your full potential, SYM encourages the professional growth and personal development of all employees by offering pathways to advancement. Our training model consists of a mixture of delivery methods including a Learning Management System consisting of self-guided module training through videos, written, and in-person instruction. We recognize there is more in life than work, so we also support family commitments and encourage community involvement.

To learn more about our company, visit this link: SYM Financial. Who We Are. (youtube.com).

What does this role entail?

This role supports our team of Financial Advisors who guide our clients in achieving their financial goals through holistic wealth planning. In this role, you will be paired with a team of 1-2 advisors and a Financial Planner to support their assigned client book. Primary responsibilities include but are not limited to:

- Coordinating communication with clients, advisors, and custodians to open new accounts, conduct transfers, and perform money movements
- Scheduling client meetings using email, Microsoft Bookings, Microsoft Teams and Outlook Calendar
- Organizing action items with internal team members and the client following client meetings
- Preparing for client meetings by organizing meeting material in Word and running necessary reports in our portfolio management software

- Proactively supporting advisors by anticipating client needs and enabling advisors to maximize their time
- Accurately and efficiently handling requests from advisors and clients within 24 hours
- Displaying professional communication skills with written and verbal responses to clients, advisors, and team other members
- Collaborating with our custodians and internal team members to follow up on and executing operational items in a timely manner
- Monitoring and mitigating daily time-sensitive requests such as money movements, trade requests, and custodian alerts
- Understanding CRM workflows and reporting; utilizing CRM to document client information, notes, and action items
- Assisting other teammates when workflow is heavy in order to complete client requests and meet deadlines

What are we looking for?

Must Haves:

- You have earned at minimum an associate degree from an accredited college or university
- You have robust PC knowledge, typing skills, and proficiency in Microsoft Office Suite
- You exhibit excellent written and verbal communication with a professional demeanor
- You can demonstrate strong problem-solving skills and the ability to synthesize a recommendation or solution based on disparate and sometimes incomplete information
- You are highly motivated, adaptive, and able to manage multiple priorities in a fast-paced environment
- You are able to work with teammates and clients while presenting a resilient, positive attitude

Preferred:

- You have 2+ years of experience in the financial services industry
- You have experience working with a Client Relationship Management (CRM) software
- You have prior experience with Schwab, Fidelity, and DocuSign
- You have the desire/ability to work successfully in a small company environment

What's in it for you?

- Competitive pay based on experience plus incentive compensation
- Health Care, Vision, Dental/Orthodontic, Life, and LTD Insurance
- 401(k); 6% Match
- Paid Time Off / Parental Leave / Family Time Off / Volunteer Time Off
- Option for Pet Insurance / Fitness Match / Apparel Allowance
- Tuition / Certification Assistance Program
- A defined career framework to help you successfully manage your career goals.