



Client Account Administrator Opportunity November 2013

About JNBA

Bloomington-based JNBA is a 35-year-old, independent, fee-only wealth management firm specializing in goal-directed asset management and financial planning. Our advisory teams champion a collaborative approach, customizing investment strategies to meet clients' goals and reviewing client portfolios every 10 business days.

Duties

A Client Account Administrator is responsible for managing the administrative work related to client accounts and relationships. Teaming with Client Account Specialists, responsibilities include preparing and managing client and custodian paperwork, generating client portfolio reports as well as helping accurately update and maintain information at the firm and custodian. This detail-orientated role may also help with client-based projects as appropriate.

Required Skills and Experience

Our ideal candidate has:

- Bachelor's Degree
- Internship experience in a client service and/or operational support role
- A strong desire to learn JNBA's tools and processes
- Outstanding communication skills, both verbal and written
- The position will have access to confidential information and will work in an industry requiring strict performance guidelines to ensure compliance in all activities
- Highly proficient with Microsoft Office (Excel, Word, Outlook) and other software applications
- Demonstrated professional track record of operating in alignment with our organizational values of:
 - o *Integrity*
 - o *Honesty and Transparency*
 - o *Independence*
 - o *Professional Excellence*
 - o *True Service to Others*
 - o *Fulfilling our Fiduciary Duty by Acting in our Clients' Best Interests at all Times*

Salary & Benefits

JNBA offers competitive salary and benefits based on experience and qualifications.

Contact

To learn more about JNBA, please visit our website at www.jnba.com. Interested applicants should send their resume and salary requirements to careers@jnba.com.