



Client Account Specialist 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 Specialist is responsible for ensuring that client account and personal information is accurately maintained both at the firm and with the custodian. Teaming with an Advisor on all client relationships, a Client Account Specialist is an important member of a client's advisory team as this role fulfills client requests as well as troubleshoots issues and addresses client questions often directly with the client. A Client Account Specialist also will participate in client meetings as assigned and is responsible to complete and monitor follow-up tasks from the meeting, as appropriate.

Required Skills and Experience

Our ideal candidate has:

- Minimum of 2 years experience in a client service and/or operational support role
- Bachelor's Degree
- 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.