

Financial Planning Assistant
Vermillion State Bank

Job description:

The financial planning assistant will be responsible for managing the administrative process for client accounts. He/She will work closely with financial planners to generate account documents & client performance reviews. The associate will also be responsible for daily service and updates relating to client accounts. The position will offer room for growth for those willing to learn.

Position Requirements:

- Bachelor's Degree
- Series 7, Series 66 & insurance license preferred/Ability to pass within 6months of hire
- Proficient in Microsoft Office suite of products
- Excellent verbal and written communication skills

Position Status: Full Time

Salary/Wages: Salary based on experience/Benefits

Location: Inver Grove Heights, MN

Send Resumes to: andrew.lucking@ceterais.com

Subject Line: Financial Planning Assistant

Registrations held through Cetera Investment Services LLC, member SIPC