

Stevens Foster Financial Advisors
Position Description

Position & Primary Responsibility

- Client Service & Data Specialist: Prepare financial paperwork and client balance sheets, administer Junxure CRM and ClientView portal, and monitor client data integrity

Selected Other Responsibilities

- Achieve and maintain power user expertise in Junxure, ClientView, MS Office, & broker-dealer portals
- Define and communicate proper content of data fields and enforce data integrity
- Train staff on proper use of Junxure and ClientView
- Identify process & procedure improvements and systems integration opportunities and recommend to management
- Develop reports and procedures to monitor data integrity
- Determine and enforce the firm's prescribed usage of Junxure and ClientView
- Complete any other assigned tasks

Required or Preferred Education & Experience

- 3+ years of financial services experience required
- 2+ years of information technology experience required
- High School diploma required
- Bachelors Degree preferred

Essential Skills

- Microsoft Office (Word, Excel, Outlook)
- Microsoft Access knowledge preferred
- Contact and task management software (prefer Junxure CRM experience)
- Fidelity Wealth Central broker-dealer portal
- ClientView client portal
- Communicate clearly and professionally in English, both verbally and in writing
- Telephone system (currently Integra)
- In depth understanding of financial terminology and concepts, account transfer process, beneficiary designations, account titling, and estate planning,
- Basic investment knowledge
- Windows

Essential Personal Attributes

- Passion for customer service, technical excellence, and efficiency
- High level of motivation to master new skills
- Enjoy working in a small company team environment; ability to work well with others
- Organized, capable of managing one's own time, priorities, and deadlines
- Maintain confidentiality
- Deliver results with minimal supervision
- Can balance multiple, competing priorities
- Has integrity and keeps promises
- Optimism
- Adaptability
- Identifies solutions, not just problems
- Detail oriented
- Professionalism in both presentation and attire

Working Relationships & Conditions

- See organization chart for reporting relationships
- Interacts with all members of the firm
- Professional office environment
- Minimal travel
- Full time positions generally involve 40 or more hours per week depending on work load

Contact Information

- Please forward resume and letter of interest to philipb@stevensfoster.com