



Client Services Coordinator

We are looking to add to our growing firm and currently have an opening for a full-time (40 hours/week) Client Services Coordinator. At Greenwald Wealth Management, we enjoy helping physicians and dentists manage their financial affairs to achieve their long-term financial goals.

The key to our success? Working collaboratively as a team to listen, identify and meet our clients' needs.

In this role, key responsibilities would be:

- Coordinate and execute client service activities, including but not limited to:
 - Opening/closing investment accounts
 - Account maintenance (name change, address change, etc.)
 - Account contributions and distributions
 - Account transfers
 - Beneficiary designation changes
- Provide administrative support, as needed:
 - Answer phone and handle all client service issues within capacity
 - Schedule client appointments
 - Maintain updated client contact records and notes using CRM system
 - Assist with client reporting and billing
 - Coordinate staff meetings
 - Maintain records and files as required by the Compliance department

Successful candidates will have:

- High level of attention to detail and accuracy
- Excellent written and verbal communication skills
- Sophisticated organizational skills, including physical and nonphysical resources
- A self-starter who can work independently and ability to identify and solve problems

Qualifications include:

- BA or BS preferred
- One to two years of experience in the investment/insurance industry
- Familiarity with National Financial Services (NFS) is a plus

The ideal candidate is dependable and trustworthy, well-organized and consistently follows high standards of business/professional ethics.

Think you would be a good fit for our St. Louis Park-based financial planning firm focused exclusively on physicians and dentists? Then, email your resume with a cover letter stating why you are interested in and suited for this position to joel@gwm.life. We look forward to learning more about you!