Senior Client Account Manager - Financial Services

About the Job

Full service financial planning, investment management, and tax services firm seeks a Senior Client Account Manager to join our twenty person office. The individual in this role will manage client relationships and complex scenarios profitably and facilitate client decision making through presentation of firm created financial strategies. The individual must understand and convey client goals and objectives to the organization and work productively with others on our team to design effective options to meet those goals. Success will require a strong understanding of executive benefit and compensation plans and tax planning strategies for high net worth clients.

This individual will communicate regularly with clients regarding their objectives and their progress, our financial recommendations, and the value added by our team. The individual will price services transparently and consistent with our internal Value Guide, delegate administrative tasks to a Client Service Associate, and communicate relevant client information throughout the organization to enable technical specialists to address client objectives.

Education and Experience Requirements Required or Preferred for Hiring

- 10+ Years of financial services experience required
- Bachelors degree required
- CFP, CPA/PFS, or ChFC/CLU required
- Series 65 license required
- Minnesota insurance license required
- Relational sales experience preferred

Skills Required for Initial and Long-Term Success

- Microsoft Office Suite (Word, Excel, Outlook)
- Junxure contact management software
- Fidelity WealthCentral broker-dealer portal
- Clear, professional, verbal and written communication in English
- In depth understanding of financial terminology and concepts, account transfer process, beneficiary designations, account titling, and estate planning
- In depth understanding of investment markets, strategies, and products
- In depth individual, fiduciary, and estate tax knowledge
- In depth understanding of life and disability insurance, Social Security benefits, estate planning, employee benefit plans, deferred compensation, stock options, college funding strategies, retirement plans, and tax principles

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 and Conditions

- Interacts with all members of the firm
- No unusual physical requirements
- Professional office environment
- Minimal travel

How to Apply

Please submit your resume to *stevensfoster@stevensfoster.com* for consideration.