



860 N Reading Road, Ephrata, PA 17522

(717)-690-1335

officeteam@pathwayfinancial.biz

Client Services Specialist

Description:

The Client Services Specialist at Pathway Financial Group will work with the licensed advisors in managing client relationships through customer service and admin support. Training will be provided in all administrative areas of the company with a goal of a rounded knowledge base to facilitate assistance in as many areas as possible throughout the company.

Role and Responsibilities:

- Schedule client meetings
- Prepare illustrations, applications, and other visual aids to be used in client meetings.
- Manage client relationships with email and phone correspondence throughout the financial planning process.
- Review and update client information for review meetings.
- Provide office admin support as detailed below.

Skillset for a successful Client Services Specialist Candidate:

- Detail oriented with demonstrated organizational skills.
- Effective communicator, able to provide friendly service in all situations.
- Team player, yet independently minded and highly motivated.
- Open to working a flexible schedule.
- Proficient user on a wide variety of computer programs.
- Abide by industry rules and regulations.

Office Admin Support Duties:

- Incoming and outgoing client phone calls
- Paperwork processing for new applications and service requests
- Client follow-ups via phone/text/email
- Interact with compliance and vendor back offices to ensure a positive client experience.
- Serve as a buffer to the licensed advisors to help protect their time constraints.
- Assist in client events and office marketing initiatives.

Education and other Requirements:

- (Required) High School Diploma
- (Preferred) 2 years of experience in an administrative or customer service position

Benefits:

- Flexible schedule
- Paid Holidays and Vacation
- Company retirement plan with matching contributions
- Hourly rate
- Bonus opportunities available

Please submit resume and direct all inquiries to officeteam@pathwayfinancial.biz

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