



Let's build your future together!

621 7th Avenue, Beaver Falls, PA 15010
www.jumetfinancial.com
724-944-0159

Charitable Entities Associate – Full Time

Jumet Financial is committed to providing our clients with well-informed, personalized advice, and to create a disciplined framework within which financial decisions are made, implemented, and managed from generation to generation. Jumet Financial is seeking a highly efficient and detail-oriented individual with the same strong standards for the role of Charitable Entities Associate with the potential to grow into a Charitable Entities Advisor or Consultant. The position requires a high level of confidentiality and professionalism, excellent time and project management skills, and the ability to manage multiple work streams (both internal and external) at once. The qualified candidate must show high regard for client needs and not only be efficient, but also build rapport with current clients and prospective clients. The individual will have a desire to continue their education and skill development toward managing and building a Charitable Entities Team.

Primary Duties and Responsibilities:

- Assist advisors with preparation of presentations to Charitable Entities representatives and boards
- Assist advisors with preparation
- Assist advisors in supporting the Charitable Entities in various initiatives from a relationship perspective to attending various foundation events
- Assist with the communication and administrative duties involved in the onboarding of a foundation
- Deliver outstanding client service, relating to general client support and answering general questions about accounts as needed
- Participate in team meetings and support staff meetings – in particular, those involving the ongoing development and support of the Charitable Entities Division
- Aid in the growth and development of our Charitable Entities Division
- Other assigned duties from management
- All Jumet Financial employees are required to help serve our community through initiatives planned by the Jumet Financial Team

Qualifications:

- Associates or bachelor's degree in progress or in a business or finance related field and willingness to continue education towards certifications and/or advanced degrees
- Strong passion to work in and succeed in the financial industry
- Strong passion for the community and its development
- Willingness to obtain various securities and insurance registrations (upon request)
- Excellent Computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent communication skills (spelling, grammar, and proofreading) written skills and verbal skills
- Excellent organizational and time management skills
- Ability to prioritize and multi-task
- Ability to exercise confidentiality and discretion

Eligible candidates will be required to pass a thorough background check.

All qualified candidates should email resumes to careers@jumetfinancial.com