CLIENT SERVICE ADMINISTRATOR

FULL TIME

Jumet Financial is committed to providing our clients with well-informed, objective advice and to creating 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 Client Service Assistant, with the potential to grow into a Client Service Officer role. The position requires a high level of confidentiality and professionalism, excellent time and project management skills, and the ability to manage multiple workstreams (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 and prospective clients. The individual should have a desire to continue their education and skill development toward managing and building a client service team.

Primary Duties and Responsibilities:

- Handle day-to-day activities, including written and verbal communication with clients as well as necessary client account transactions, before the end of the business day / close of market
- Assist in maintaining complete and accurate records of client activity in the CRM
- Maintain operational documents (such as spreadsheets) and assist with various internal projects, including drafting agendas and attending internal meetings
- Cultivate relationships and maintain contact with current and prospective clients, coordinating meetings and phone calls between Jumet Financial advisors and current or prospective clients
- Assist the advisor with note-taking during client meetings
- Complete client deposits and maintain necessary documentation
- Maintain the schedule of account reviews and complete review forms as necessary
- Send client mailings, including greeting cards and swag, and monitor supply quantities
- Help serve our community through initiatives planned by the Jumet Financial team, as required of all employees
- Assist with other duties as required by management

Qualifications:

- Associate's or bachelor's degree (in progress or completed) in a business-related field, with a willingness to continue education toward certifications and/or advanced degrees
- Strong passion for working and succeeding in the financial industry
- Willingness to obtain various securities and insurance registrations, as required
- Excellent computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent written and verbal communication skills, including strong spelling, grammar, and proofreading abilities
- Excellent organizational and time management skills
- Ability to prioritize and multitask
- Ability to maintain confidentiality and exercise discretion

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Pennsylvania - HQ
Office: 724.384.8758
621 7th Avenue, Beaver Falls, PA 15010
www.jumetfinancial.com

Eligible candidates will be required to obtain applicable clearances and pass a background check. All qualified candidates should email their resumes to **careers@jumetfinancial.com**