

## Client Service Administrator

Abacus Planning Group is a fee only financial planning firm with a holistic approach to serving our clients. We are looking for a Client Service Administrator who is dedicated to helping our clients make smart financial decisions.

### Duties and Responsibilities

The Client Service Administrator is an integral member of the client service team and works in support of client financial and investment advisors. Superior client service is a guiding principal; common responsibilities include--

- Producing custodial account paperwork for clients along with coordinating it through to completion.
- Managing client information, regularly updating data in the client relationship management system.
- Producing and distributing recurring information to clients.
- Troubleshoot and research problems related to position functions.
- Being a member of the Abacus First Impressions team which among other things, includes greeting guests and answering incoming phone calls.

### Qualifications

Client Service Administrators typically possess the following qualifications:

- Bachelor's Degree
- High EQ (emotional quotient.)
- Financial Paraplanner Qualified Professional®, or the willingness to do what it takes to obtain certification.
- Proficiency in using common office technologies, plus the agility to quickly learn new technologies as they become available.
- A friendly, upbeat and inviting demeanor.
- An orientation to details.
- Ability to manage multiple demands which will on occasion exceed the amount of time available.
- Strong written communication skills, including a mastery of English grammar

### Working at Abacus

Abacus is a unique firm with a unique working environment.

- The Abacus Cultural Norms are–
  - Listen, and then listen
  - Keep a beginner's mind
  - Embrace change
  - Seek mastery
  - Practice gratitude
  - Commit to radical responsibility
  - Honor the sanctity of confidentiality
  - Remember "it's not about you"
  - Create energy not time
  - Celebrate
- A defined Leadership Pipeline structured so employees know their necessary competency areas, skills required, and work values at each stage of development. In addition, we define the support Abacus will provide as you progress through the Leadership Pipeline.
- A salary commensurate with experience and abilities. Benefits include health insurance, a profit-sharing plan along with several others creating a broad package of employee benefits.
- An Incentive Bonus Pool – a well designed plan aligning compensation of employees with the strategy of Abacus Planning Group to create an upside in total compensation.