

New Client Specialist

Description

Do you have a passion for the financial industry and knowledge of processing important client paperwork? Our fast-paced financial firm is looking for a strong, detail orientated Client Service Representative to ensure the client acquisition process from application submission to policy delivery is as smooth as possible. We are seeking a hard-working, positive individual to join the continuously growing team. If you are seeking a company that cares about team members and clients, we want to talk to you! Our office prides itself on providing the ULTIMATE client experience. YOU can make a direct impact on our client's financial freedom!!

Minimum Requirements:

- Previous experience in processing new business paperwork in a financial office preferred
- Intermediate to advanced computer skills desired. Experience with excel required.
- Must have Experience with Annuity applications and transfers.
- Must have a full understanding of Tax Qualified and Non Tax Qualified Accounts
- Experience with Brokerage and Life Insurance accounts

This position requires that you possess the following skills:

- Strong organizational skills and attention to detail
- Ability to work with important paperwork without much client interaction
- Ability to demonstrate persistence to achieve quality
- Excellent communication – both verbal and written
- Self-directed initiative
- Process driven
- Strong follow-through

Responsibilities

Putting client needs first is deeply rooted in our culture and at the core of everything we do. In providing excellent client service you will:

- Complete and process all applications for business submitted by agents
- Ensure accuracy of information provided and all forms needed are included when forwarded to the insurance/security agencies.
- Submit all completed in good order applications and forms to the proper agencies.
- Follow-up on pending applications with various insurance/security agencies and transfer companies to keep the application process moving forward.
- Research and analyze application issues and provide problem resolution
- Answer agents' requests and respond to their needs in a timely manner
- Additional duties and responsibilities as required by management

Hiring organization

Foguth Financial Group

Employment Type

Full time

Industry

Financial Industry

Job Location

315 W. North Street, Suite C,
48116, Brighton, MI

Date posted

November 25, 2019