Wealth Management Support Specialist
Full Time

We are looking for a Wealth Management Support Specialist to join our team! In this role, you'll be a key partner to our Wealth Advisors, providing administrative, sales, and client relationship support. You'll have the opportunity to engage directly with clients of the Wealth Management Department, delivering exceptional service both independently and under the guidance of Wealth Advisors.

What You'll Do:

Client Relationship Management Support
Provide essential administrative support to Wealth Advisors by responding to client inquiries, researching and resolving issues, and retrieving information using trust accounting software. You'll independently manage routine client account functions with accuracy and sound judgement, identifying when matters require input from a Wealth Advisor. This includes processing account transactions (excluding investment trades) as directed by clients or advisor.

Sales Support
Support advisors throughout the sales process by handling administrative tasks such as completing required forms and documentation, collecting client and asset information, and ensuring timely follow-up on outstanding items necessary to book new accounts.

Administrative Support
Assist other department administrative staff by managing call reports and correspondence as well as maintaining both client and departmental files in an organized and timely manner. Additional responsibilities include coordinating client public relations efforts, preparing mailings, and, when directed, reviewing obituaries to identify impacted clients and initiating appropriate follow-up with Wealth Advisors.

General Department Support
Contribute to the smooth operation of the office by sorting mail, recording deposits, balancing the department checking account, and overseeing the client gift program. You'll also monitor office inventory, ensuring proper supplies are on hand and the office is presentable for clients. For accounts opened or closed by Wealth Advisors outside of the home office, you'll complete the necessary steps that cannot be completed remotely. Special projects may also be assigned as needed.

Why You'll Love It:

You will work alongside a supportive, professional team that values accuracy, integrity, and teamwork and are eager to support your development.

- Your attention to detail and commitment to excellence will directly contribute to operational success.
- Enjoy a stable schedule and a healthy balance between your professional and personal life.
- At SNBT, our employees are owners of the bank through our ESOP (Employee Stock Ownership Plan). The work you put in each day directly benefits the success of YOUR company.

Qualifications:
Candidates must be high school graduates, with an associate degree in a relevant field preferred. The ideal candidate will possess excellent customer service and communication skills, including strong listening abilities. Proficiency in PC applications and a high attention to detail are essential, along with a basic understanding of investments. The role requires the ability to work collaboratively within a team, follow directions thoroughly and accurately, and manage multiple tasks effectively while prioritizing responsibilities in a timely manner.