7/24/2024

Wealth Management Support Specialist

SUMMARY:

The Investment center/Wealth management Support Specialist provides sales support to our Advisors and administrative support to the department. In addition, the position is responsible for the processing of all daily work received and processed by the department. Position will also have direct contact and provide customer service to clients.

MAJOR ACCOUNTABILITIES:

Sales and Operational Support – (for both Investment Center/WM Department) Prepares and processes new account applications and related documents accurately and timely. Responsible for creating and maintaining customer information and accounts both in client files and department software. Process withdrawals & contributions accurately and timely. Tracks all items to ensure timely and accurate completion by third parties involved.
Customer Service – (for both Investment Center/WM Department) Welcomes customers and ensures prompt attention to their needs. Listens to customer questions/requests; responds to customer questions/requests accurately, courteously, and in a timely fashion.
Administrative Support – Assist Advisors by preparing correspondence, maintain Investment Center required copies of forms and files, tracking client reviews, setting appointments, and documenting client meetings. Coordinate and monitor supply of office products as well as product information from vendors. Responsible for accurate and timely completion of special projects as determined or assigned.
Compliance – (for both Investment Center/WM Department) Responsible for ensuring client paperwork & files, and overall department files/systems are compliant with all regulations and SNBT policies.

QUALIFICATIONS:

Excellent customer service skills, highly confidential and professional in working with clients, regular and predictable attendance, excellent organizational and prioritization skills, able to communicate clearly both written and orally, comfortable in both a team and/or independent working environment, willingness and ability to learn new processes or activities, ability to work at times with minimal supervision, able to perform efficiently and effectively under various imposed deadlines, and strong attention to detail.

High School Diploma, at least 3 years customer service-related experience, prior experience managing people, proficient with Windows, Word, Excel, and Internet. Associate or bachelor's degree preferred but not required. Previous experience in the Insurance or Securities industry preferred. Series 7 & 66 securities licenses or ability to obtain within 12 months.

APPLICATION PROCESS:

Apply in person at 1820 Hall Ave, Marinette, WI 54143, at any of our locations, or online at www.snbt.com/Careers. Resumes may be sent to employment@snbt.com.

Equal Opportunity Employer