

Job Title:	Financial Services Assistant	Status:	Non-Exempt
Department:	Financial Services Division	Position Type:	Full Time
Location:	Harrisonburg, VA	Travel:	As Needed
Training:	Role Specific	Reports to:	Financial Services Division Manager

Job Description

Role

The Financial Services Assistant provides assistance to the Financial Advisors. The person in this position will complete financial profiles, provide client service, assist with marketing, handle departmental filings, and be knowledgeable and proficient with pertinent computer software. This individual also provides operational assistance through administrative duties and special projects. It is important to maintain confidentiality of corporate and client information at all times.

Essential Duties and Responsibilities

- Work closely in support of the Financial Advisors assisting with client financial profiles, client service, marketing, submitting new applications, entering information into designated databases, and other duties as required
- Provide high quality service in a professional manner
- Assist in special projects including but not limited to: marketing, company branding, compliance, and internal reports
- Data gathering and dissemination of specific client communications
- Maintain the ability to generate reports and output data for various purposes through the office management system
- Precise and detailed data entry into the office operating system
- Proper filing of accounts and client data
- Importing and record keeping of monthly commissions
- Provide administrative support as directed
- Other duties as assigned by management

Qualifications and Education Requirements

- High school diploma required. Additional college courses and/or office environment experience is a plus
- Communicate effectively and courteously via telephone and in writing; good interpersonal skills
- Must have proficiency in select Microsoft Office programs; ability to learn and use proficiently industry specific software
- Must be able to complete tasks with limited supervision
- Must be adaptable and work well with co-workers

Preferred Skills

- Must present well-developed communication skills, effectively and courteously
- Willingness to extend training and education as needed in support of duties
- Attentive to detail, data entry, recall

Additional Notes

- Provide account rounding opportunities to other departments: Employee Benefits, Individual Life and Health products, Personal Lines, and Benefits Administration
- Pay will be reflective of the current compensation plan as designed for this department

Physical Requirements

- Must be physically able to work a minimum of 40 hours per week
- Must be able to sit for long periods of time, which may include extensive use of personal computers and associated software
- Must have the ability to hear, see, and speak
- Must be able to stand, sit, walk, use repetitive small motor activity, use hands and fingers, reach with hands and arms, stoop, and kneel
- Occasionally required to lift and carry up to 20 pounds
- Perform with a high-energy level and ability to handle stress-related situations on a daily basis
- Must have a valid state issued driver's license and have the ability to operate a motor vehicle
- Will be required to drive and travel unaccompanied in diverse weather conditions