Job Overview	
Job Title	Client Experience & Investment Administrator
Company	Weyers McKeever Financial Partners
Location	Crystal Lake Area, IL
Reports To	Scott McKeever / Carrie Weyers

Organization

Weyers McKeever Financial Partners is a financial services firm providing professional services to businesses and individuals. Our firm provides leadership, creativity, and collaboration through our team process which we believe results in confidence and clarity. We work with each client to create a unique financial vision and strive to be their most trusted advisor as a result of our shared processes, holistic strategy, and valued relationships.

General Job Description

We are seeking a part-time client experience & investment administrator to join our small, close-knit team. This qualified candidate will be responsible for processing and servicing all team investment business, while servicing the needs of existing clients.

This person will report to, and work directly with, the Director of Operation's team, & be mentored by a lead advisor.

Duties & Responsibilities

Work with Advisor(s) to:

- Preparing proposals and investment policy statements for advisory clients.
- Create and monitoring an activities system for account follow ups and service requirements.
- Thoroughly documenting and following case notes, thought process and analysis assumptions.
- Collaborates with Advisor regarding allocation and planning strategies.
- Ensuring compliance requirements are implemented and followed.
- Generate reports for existing business.
- Assist advisor in product research.
- Assist advisor in case preparation.

Work with Operations Team to:

- Preparing and processing all paperwork needed for investment accounts.
- Send app to client for e-signature
- Monitor case until account is in IGO status
- Monitor transfer process until completion and/or provide client with rollover instructions (help with any necessary rollover paperwork)
- After assets have been received and invested:
  - Complete before & after spreadsheets
  - Client communication (funds have been received)

- Maintaining client case files and performance reports.
- Responding to back-office inquiries.
- Control all service functions such as preparing letters instruction (e.g., asset/account transfers, beneficiary changes, etc.) for client signature, following up with clients to confirm receipt of forms or to collect outstanding paperwork for account management.
- Provide ongoing service to clients, as needed (for investments)via phone, email and text.

EDUCATION & EXPERIENCE

Required:
Minimum of High School Degree, College Degree preferred
Previous experience with administrative, office management and client service support

Background check and fingerprinting required.

Desired:
Previous experience in the financial services industry
Securities licensed is preferred

SKILLS & ABILITIES

- Detailed and accurate
- Articulate
- Excellent inter-personal skills, both written and verbal
- Proactive and ability to self-direct
- Strong collaboration, dedication and focus
- Takes initiative to solve problems independently and creatively
- Ability to strategically manage time and prioritize work
- Must be able to maintain integrity of sensitive and confidential information
- Adaptability to changing demands and responsibilities
- Good IT skills (Microsoft Word, PowerPoint etc.) especially **Excel**
- Ability to work independently and within a team

WORKING CONDITIONS	
WORK ENVIRONMENT	In office with flexibility to work remote
HOURS	Part-time with possibility of expanding to full-time
SALARY	$20 - $25 / hour (commensurate with experience)
BONUS	Dependent on company performance
BENEFITS	Not included
OTHER	Computer provided, Will cover licensing costs