Client Service Financial Administrator

Full or Part-Time

Financial Freedom for Dentists LLC

Is This the *Role for You…?*	This is the *Place for You If…*
☑ Do you love serving and helping people solve problems, working with numbers, processes, and details with precision? ☑ Would you enjoy helping people achieve financial freedom with time-tested principles of financial planning and investment management, supporting Certified Financial Planner™ professionals as a fiduciary (always committed to the best interests of each client)? ☑ Are you organized, tech-savvy, and have precise attention to detail to support and administer efficient office systems?	☑ *Work/Life Balance and Flexible Schedule:* More than just a good idea—it is the way we work and live in our family-friendly team in Snoqualmie, WA (exit 25 off I-90). ☑ *Integrity Matters:* Trust, Communication and Expertise are core values—what we say we will do. ☑ *Your Voice Matters:* Your work and input can make a real, lasting impact on the clients, the office organization, and company growth and direction.

Company Overview

Join a premier fee-only Financial Planning & Registered Investment Advisory (RIA) Firm serving Dentists in the Pacific Northwest to serve a vital role meeting the needs of clients and helping to manage day-to-day operations. Financial Freedom for Dentists, an SEC Investment Advisor provides comprehensive fee-only financial planning and investment management for Dentists and their partners to ***Empower Dentists to Achieve Financial Freedom***. In our beautiful Snoqualmie office (right off I-90, 25 miles East of Seattle), we empower clients to reach their goals of financial freedom using an investment management philosophy based on academic research and evidence-based results. Now with an established loyal client base, and presenting regularly at dentist study clubs and conventions, we are uniquely positioned to grow to serve more clients throughout the Pacific Northwest.

Compensation & Benefits

Hours: Part-Time or Full-Time; Option of Flexible Hours to Ensure Work/Life Balance.

Pay: Starting at $25/hour or Dependent on Experience. Competitive. Bonuses & Incentive Potential.

Benefits: Health & Dental Insurance, Paid-Time Off, 401(k), Mentorship & Career Growth Opportunities.

Responsibilities	Qualifications
• Support Financial Advisors in administration of accounts, including processing investment paperwork opening investment accounts and overseeing investment transfers, placing trades, completing & submitting custodian, and client paperwork accurately via mail or DocuSign, following up with clients, communicating with the investment custodian, and resolving any issues that arise in real-time. • Act as the “face” of our firm, communicating effectively with clients over the phone and by email to resolve any outstanding issues of administering and transferring accounts or in the paperwork process. • Maintain accuracy, completeness, and integrity of client data within our client relationship management system. Verify client accounts are established and transferred correctly. Master client on-boarding process. • Provide general office support and organization for the business, including basic office responsibilities: answering phones, scanning, office organization to improve efficiency of office procedures and processes on the operations side of the business. • Help maintain the advisors’ calendars. Initiate phone and email follow-ups to schedule meetings for clients. • Support and coordinate compliance efforts under direction of CCO (trackers, documentation, etc.). • Help with trading (once certified with Series 65). • Handle any other tasks within an administrative capacity, taking charge to organize and create new systems and processes to improve efficiency.	• Highly organized, process-oriented, and accurate with the ability to follow through and maintain close attention to detail. • Strong proficiency in Excel, Outlook, Word, and CRM software and extremely comfortable computer skills & utilizing technology. • Series 65 Certification and/or a willingness to receive certification within 6 months of hire date. Understanding of key financial, investment and risk management concepts and experience working in an investment firm helpful. • A passion for serving clients with the ability to solve problems and anticipate client needs. • Superb verbal and written communication skills, especially the ability to listen, work well with others and empathize with clients. • Administrative experience, experience with CRM software and/or maintaining client accounts. • A self-starter with time management skills and ability to work with little supervision. • Ability to efficiently task switch and operate on tight timelines. • A team player who is highly flexible, collaborative, responsive and proactively engaged in building relationships. • Dedicated to highest integrity and maintaining confidential information.

Interested in Applying?

Please submit your resume, cover letter and at least two references to *Apply@Freedom4Dentists.com*

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