

POSITION AVAILABLE

Private Client Specialist: PCS

(Los Angeles region)



Our client is one of the world's largest providers of financial services. The firm is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and many other financial products and services to more than 20 million individuals and institutions, as well as through 5,000 financial intermediary firms

The Private Client Specialist (PCS) works with customers who are assigned to a designated Private Access Account Executive. These clients have at least \$1 million in assets with our client. The role of the Private Client Specialist (PCS) is to provide customer service and operational support to the Private Access Account Executive. You will act as a sales assistant to the Account Executive. You will help to manage all inbound calls generated by a book of clients as well as operational and transactional processing, while acting as a conduit between the Account Executive and the client to resolve service/trading/sales issues.

Duties and Responsibilities

- Handle inbound customer inquiries of all types (trading, service, sales)
- Serve as quality control point to ensure that all calls, paperwork, policy and procedures for customer requests have been adhered to in accordance with compliance requirements
- Account Executive in implementing a structured client contact strategy and promote annual guidance reviews
- Schedule appointments and prepare pre and post appointment literature

- Facilitate increased contact between the Account Executive and those clients that have routinely used the central phone Relationship Managers in the past
- Basic sales interactions / conversations to help advance the sales cycle
- Maintain the Guidance Interaction Reports, Retirement Income Plans, Portfolio Investment Reviews and Estate Plans as gathered and provided by the Account Executive
- Assist in basic prospecting and/or sales communication with clients in the Account Executive's book at the discretion of the Account Executive

Qualifications

- 1-3 years in financial services with an emphasis on customer service
- Series 7 & 63 Securities Licenses required prior to hire
- Series 65 and/or Series 66 and state registrations must be obtained within 3 months of hire
- Must have strong interpersonal skills and the ability to deliver highly personalized service to a group of High Net Worth clients
- Exceptional client service phone skills
- Must have extensive knowledge of Fidelity's policies and procedures and ability to work in a fast paced deadline oriented environment
- PC/Windows skills

Send Resume if interested: info@willis-consulting.com

Compensation is salary plus bonus

Experienced. Discreet. Independent.