STRATOS
WEALTH PARTNERS
BUTSON FINANCIAL ADVISORS, LLC DIVISION

Join Our Dynamic Team

Do you want to be part of a young, energetic team culture? Are you looking for an opportunity with an entrepreneurial, growing firm? If so, read on.

At **Butson Financial Advisors, LLC**, we believe that our client relationships start with people and purpose and our firm culture is based on this fundamental appreciation of what wealth means to each individual person and family. If you are eager to be part of a young, energetic, growing practice and are passionate about helping individuals and families work towards achieving their financial goals, we welcome you to apply.

We are seeking a qualified Client Services Manager to join our growing, independently affiliated firm in our **Grove City, Pa** branch office. This is a fantastic opportunity to continue to build your career within a structured program with access to outstanding market and growth opportunities.

The position is a full-time position (32 hours per week) that pays $18/hour with a $2 hour raise after completion of a 90-day training period resulting in $20/hour. We offer a competitive compensation package with personal time off (PTO); paid federal holidays; health insurance reimbursement; and 401k and opportunities for incentives and career growth within our organization.

THE ROLE

The Client Services Associate will help us deliver excellent support and service to clients. You will support the firm in delivering outstanding client service through in-person, phone, and electronic communications with clients as well as financial institutions. The role requires someone who is internally motivated and self-directed but can collaborate and work as part of a team. The ideal candidate must be thorough and detail-oriented, have fantastic communication skills, and truly enjoy talking to clients and forming relationships. Additionally, you must have a strong desire to learn, grow, ask questions, and have a passion for personal development.

This is not a sales role. This position allows the individual to gain valuable experience in wealth management, develop communication and analytical skills, and progress toward more client interaction and responsibilities.

Job requirements

Job Responsibilities

- Open the office Monday through Thursday and be available to assist walk in clients.
- Assist Grove City financial advisor with branch management including phones, emails, address customer service needs, implement branch policies, procedures and organizational standards
- Handle client service calls, client paperwork, appointment confirmations, updates to client information, and extensive use of technology [Microsoft Word, Excel, proprietary investment-related software, and the Client Records Management System (Redtail)].

- Responsible for preparing and summarizing client meetings, filing in Redtail system, organizing and printing out appropriate reports, and providing necessary follow-ups.
- Manage the Grove City lead financial advisor's schedule to book client appointments. There is no “cold calling" and appointments will only be booked for existing clients and prospects.
- Coordinate with other team members, who are based in the Sewickley Office, as needed.
- Participation in marketing, advertising, and promotional activities.
- Excellent oral and written communication skills are a must.
- Willingness to accept and perform other duties, as needed and assigned.

Key Competencies

- Associate or higher degree from an accredited institution, college, or university.
- Proficiency in MS Office with expertise in Microsoft Word, Excel, Outlook, PowerPoint and Web Browsers.
- Excellent communication (oral and written), interpersonal, organizational, and presentation skills.

For more information about the practice, please visit our website: **www.butsonstratoswp.com.**

Resumes should be forwarded to Anna Butson at abutson@stratoswp.com