



Service Team Assistant (Part Time)

Novare Capital Management is a privately owned investment management firm that uses a comprehensive approach to serving our clients by providing investment management, financial planning, estate plan review and family financial education services. Our team has extensive experience and industry knowledge as well as several prestigious designations including CFP[®], CFA[®], MBA, JD, and ChFC[®].

Position:

- Customer service role supporting front-desk activities including welcoming clients and greeting people who visit the business
- Answer phone calls and redirect calls within the organization.
- Daily part time work schedule.
- CRM system (Junxure) maintenance.
- Proficient in Microsoft Office tools including using excel for data analysis.
- Member of service team sharing various office duties; distribution of correspondence, client communications and office supplies.

To be successful in this role the individual should enjoy delivering great customer service and managing multiple priorities. Individual should demonstrate pride in the company, be able to multi-task, and greet clients by phone or in person with a friendly and attentive demeanor. Must have high attention to detail and excellent written and verbal communication skills.

A typical day:

- Opening CRM system (Junxure) to recognize clients as they call
- Answering calls and re-directing calls to Advisors and Service Team Members who can assist the client.
- Input action items into the CRM system.
- Creating reports in Tamarac and mailing or emailing to clients.
- Handling client communications for advisors including monthly birthday card process.
- Monitoring advisors' calendars for upcoming client visits and calls and working with the rest of service team to be sure documents needed for these meetings are complete.

Projects:

- Create reports from key systems used, downloading them into excel for V look up, mail merge and tables.
- Working with the service team support client events and annual holiday cards and greetings.
- Assist advisors in Zoom call set up and launch.



- Assisting in physical file room organization and archiving.
- Ordering stamps and ensuring stock of mailing supplies are high.
- Point person for supplies for the office.

Please submit resume to:
Novare Capital Management
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www.novarecapital.com

Novare Capital Management is an Equal Opportunity Employer.