Operations Support Specialist

Position Overview

Our client, Premier Planning Group, is a dynamic, holistic, and independent financial planning firm in Cincinnati, Ohio. For more than 22 years, Premier Planning Group has been dedicated to making clients succeed. The firm is now seeking an Operations Support Specialist who will serve clients and internal associates to positively impact the organization.

As the Operations Support Specialist, you will be a valuable partner in maintaining client relationships. As a critical team member, you will be pivotal in delivering exceptional service and support to our valued clients. Your primary responsibility will be to ensure the smooth operation of client accounts, facilitate client communication, and collaborate with financial advisors to provide comprehensive financial solutions. This role demands strong interpersonal skills, attention to detail, and a genuine passion for assisting clients in achieving their financial goals.

Premier Planning Group is known for its talented group of individuals who are passionate about serving clients. Are you someone who thrives in a fast-paced environment with a strong eye for detail and is eager to help others? If so, let's talk!

Key Responsibilities

- Establish and proactively maintain positive relationships with clients
- Assist clients in opening new accounts for investments and insurance as well as facilitate the transfer of assets as required
- Process changes, requests, and updates as needed including cashiering (contributions, distributions, RMDs, etc.), address and beneficiary changes, etc. as needed
- Execute trade orders accurately and in a timely manner, following the firm's compliance and regulatory procedures.
- Help maintain compliance responsibilities for the firm including daily logs, processes, and procedures, etc.
- Collaborate with financial advisors to prepare financial plans and investment proposals for clients
- Maintain accurate and up-to-date client records and documentation within firm CRM (Client Relationship Management system)
- Process necessary paperwork related to client accounts, ensuring compliance with regulatory guidelines

Requirements

- 2+ Years of experience in the financial services and investments industry or a similar client-facing role is preferred
- Proficiency in using financial planning software, investment portfolio reporting tools, and Microsoft Office suite
- Detail-oriented with the ability to handle multiple tasks and prioritize responsibilities
- Relevant certifications (e.g., Series 7, and Series 63,) are preferred but not required although obtain within 12 months of start date

Desired Attributes

- Detail Oriented
- Exceptional communicator
- Self-starter

Benefits & How to Apply

Benefits include PTO, paid holidays, medical insurance reimbursement, 401K, life insurance, paid parking, disability insurance**.** A Slice of HR is working with this client on a retained search basis. If you meet the qualifications and want to join this team of talented individuals, please send your resume to **emily@asliceofhr.com**