

Emerald City Fiduciary Group is a financial planning company in Seattle Washington.

This is a mid-level position that will support one advisor, in all facets of the client relationship. You will assist in preparing for client meetings: gathering client data, entering data into our financial planning software stack; Redtail, eMoney, Albridge, Morningstar and Bill Good Marketing. You will process new account paperwork, primarily for fiduciary accounts held at TD Ameritrade. Our primary securities client monies are custodian at American Funds and Pershing. We are associated with Securities America and Arbor Point Advisors. We also do business with Variable and Equity Indexed Annuity companies.

**Benefits at Emerald City Fiduciary Group include:**

- Competitive salary and incentive compensation
- Paid time off
- A collaborative office culture with an emphasis on work/life balance.
- Possibility to work remotely depending on experience and supervision needs
- Mentoring and learning opportunities to enhance your own career track

**Key Areas of Responsibility**

Financial Planning and Client Service:

- Gather, review and input client data
- Communicate with clients regarding appointment scheduling and items needed for meetings
- Manage setup and maintenance of client portals, including account aggregation
- Prepare financial planning software data in preparation for client meetings

- Work with advisor to prepare meeting agendas and meeting notes for follow-up
- Organize and execute client communications
- Assist with client service follow-up activities including account paperwork, distributions, and other transactions as needed.

#### Office Processes:

- Assist in the development client meeting templates
- Input information into CRM
- Make recommendations for improving workflows and firm systems

#### **Qualification Requirements**

- 1-5 years' experience in personal finance (Investment Advisory, Accounting, Estate Planning or Insurance or other financial services preferred)
- Series 7,63,65,66 preferred. Not all required but compensation is based on various licenses acquired.
- Excellent written and verbal communication skills
- Willingness to accept and give constructive feedback
- Possess a high degree of accuracy and attention to detail
- Ability to manage and process paperwork efficiently and accurately
- Warm, friendly personality with the ability to connect with people
- Willing attitude: "no job is beneath me," not a clock watcher
- Independent, autonomous with a "get it done" mindset