



## Position Description – Client Onboarding Specialist

ChappelWood Financial Services serves Millionaires and Aspiring Millionaires. Our Clients expect a premier, concierge-like experience. The Client Onboarding Specialist is responsible for ensuring this happens. This is a full-time, salaried position.

The Ideal Candidate will possess:

- **REQUIRED** - Minimum of three (3) years' experience in the financial industry, i.e., investments, banking, insurance, accounting, real estate, mortgage, and/or title company.
- **PREFERRED** - Experience in Premier Customer and/or Client Service

### Essential Duties and Responsibilities

- Cultivating Client relationships through regular communication, processing specific needs and requests, and preparing for Quarterly Strategy Meetings
- Maintenance of Client files, both printed and electronic
- Onboarding new Clients by completing new account paperwork, managing and monitoring transfer of funds, and preparing a Personal Financial Organizer
- Participating in client and marketing events, both in person and virtual
- Cultivation of prospective clients through phone calls, video messages, and email
- Management of appointment calendar for Advisors of the firm

### Other Duties and Responsibilities

- Opening and closing the office as needed
- Answering phones and covering the reception desk as needed
- Other duties as assigned

### Required Skills

- Ability to maintain confidentiality of client and firm information at all times
- Exceptional time management and ability to prioritize tasks
- Exceptional communication skills with a wide array of personalities and ages
- Ability to complete assigned tasks with minimal supervision and oversight
- Willingness and ability to take initiative with minimal direction
- Experience working in a professional office setting as part of a team
- Ability to work with technology including Microsoft Office, Client Relationship Management software; email and social media; graphic design software
- Openness to coaching and willingness to learn

### Compensation and Benefits

- Salary Range - \$45,000 to \$55,000, depending on experience
- Health insurance allowance up to \$450/mth
- Participation in employer retirement plan (after 6 months employment)
- Cell phone reimbursement up to \$100/mth
- Zero Advisor Fee investment account for your personal portfolio
- Two (2) weeks of annual vacation time (after 12 months employment)
- Three (3) days of sick leave annually (after 6 months employment)

### Candidate Application Process

1. Submit resume to [Damon@ChappelWood.com](mailto:Damon@ChappelWood.com)
2. Phone interview
3. Complete questionnaire/Zoom meeting
4. Face to Face interview
5. Team interview
6. Meet the Founder and CEO