Part Time - Administrative Service Consultant / Posting

Diversified Wealth Solutions LLC, is a growing wealth management firm, is seeking a Part time- Administrative Service Consultant to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

"Become a member of one of the most respected teams in the wealth management industry. Diversified Wealth Solutions LLC, was recently recognized at the Patriot's Club for outstanding performance in 2016."

Our mission at Diversified Wealth Solutions LLC, is to advise our clients on some of the things that are dearest to them: Money, Protection and Legacy. To provide "Wealth Design for Life". The Administrative Service Consultant plays a pivotal role in attracting and retaining clients. If you have a relentless, burning desire to succeed as a wealth advisor and share our vision, then we would love to hear from you!

Description

The primary role of the Administrator Services associate will be to provide middle office services to advisor including any and all daily tasks provided by the advisor. This would include, resolving notifications, opening accounts, moving money, transferring accounts, and working directly with clients to complete any of these tasks.

Responsibilities & Activities

- Research complex situations, set client expectations, and define the actions necessary to resolve inquiries in a
- CRM (calendar) management and scheduling of client appointments
- Communicating daily with advisor and clients
- timely manner
- Assume ownership of inquiries and see them through to a timely resolution
- Communicate with internal departments to ensure we meet our clients expectations for timely service delivery
- Submit instructions for account activities on behalf of the advisor and end clients for brokerage functions (New Accounts, Cash Management, Transfers, Account Maintenance)

Industry Experience Requirements

- Strong attention to details
- Strong Excellent communication and listening skills
- Series 7 Preferred but not required
- Bachelors Degree or relevant experience providing support to financial advisors Required
- Understanding of MS Office including Excel Required

Knowledge, Skills, & Abilities:

- Excellent verbal, written, presentation, and interpersonal communication skills.
- Excellent relationship management skills.
- Superior business development skills.
- Excellent attitude and an extraordinary client service orientation.
- A genuine interest in serving and caring for clients.
- Excellent organizational and time management skills.
- A burning desire to succeed.
- Proficiency with Microsoft Office Suite.

- Bachelor's degree or higher strongly preferred.
- Attendance is an essential function.
- Salary is commensurate with experience.

We also offer a great working environment in a beautiful and professional office location. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational, and focused on improving our client's lives.

For more information about our company, please visit our website www.Dwealthsolutions.com.

If you're interested in this opportunity, please send your resume and letter of interest to Joe Pannarale at joe.pannarale@lpl.com. Given the high demand for this position, we're only able to contact the most qualified candidates.

Securities offered through LPL Financial, Member FINRA/SIPC.