



## Covenant Financial Group

346 2<sup>nd</sup> St. Reedsburg, WI 53959

### Customer Service Coordinator

#### **General Description:**

This role is critical to our client experience and requires a friendly, upbeat demeanor. The Customer Service Coordinator supports the daily operations of the practice, including, but not limited to: answering the phones, meeting/greeting clients, handling/distributing postal mail and practice email, utilizing Thrivent computer systems and programs in support of client relations, and other administrative tasks as assigned.

#### **Responsibilities:**

- Handles incoming telephone calls and responds to requests for information or directs the request to the appropriate person.
- Performs routine administrative duties such as maintaining office supplies and processing mail
- Prepares or coordinates the preparation of routine correspondence, and special projects typically of a routine nature
- Supports projects, administration of various programs, and processing functions as needed
- Drives client facing activity in the practice by scheduling meetings with clients on behalf of the practice's Financial Professionals.
- Updates the contact management system with client contact and preference information
- Assists Financial Professionals in the preparation and follow up for the client meetings
- Provides back-up support on tasks that do not require any type of licensing or registration for other staff members, as needed
- Completes other miscellaneous tasks as assigned

#### **Qualifications:**

- Previous administrative/secretarial experience desired
- Ability to communicate and provide superior customer service to our clients
- Strong technical computer aptitude and knowledge of business tools (e.g., Microsoft Word, Excel, PowerPoint) or ability to learn
- Ability to handle multiple tasks and maintain a high quality of work while experiencing frequent interruptions
- Ability to maintain integrity of sensitive/confidential information

#### **Career Progression:**

As the firm grows, we focus on enhancing roles and responsibilities to develop and support your professional growth.

#### **Compensation:**

Compensation varies significantly based on the strategy of the practice, the compensation philosophy of the practice, the specific qualifications and experience of the individual, the location of the practice and many other factors. Compensation range will be discussed at the first interview.

#### **To apply:**

Please submit your resume and cover letter via email to Carrie Stando, [carrie.stando@thrive.com](mailto:carrie.stando@thrive.com).