



Job description

Symphonic Financial Advisors is seeking qualified candidates to interview for a Wealth Management Support Specialist in Kansas City, Missouri. The basic functions of the position are to provide day to day client service and administrative support for the management team. The position is full time, with a competitive benefits package. Currently, daily tasks will be spent in the office on the computer for two days/week, and three days hybrid work from home), and travel to other offices when necessary. Good opportunity for graduates with a focus on financial planning or personal finance – a chance to build your financial services practice outside of the position requirements. If you are motivated, enthused and enjoy working with a small team of like professionals, please reach out to us!

Administrative/Client Services Support: Provide administrative assistance services for the Director in areas of:

- Insurance support for advisor teams
- Marketing
- Training Materials
- Answer phones and receive guests in the office
- Assist in the planning and execution of annual adviser conferences
- Maintain a Forms Library and assist in the update of forms
- Learn and manage proprietary investment management software
- Monitor the Client Services requests and process as needed
- Serve as back up to Client Services team
- Maintain efficient communication through email and other channels as needed

Recruiting Initiative Support: * Initiate contact with potential advisor/CPA candidates for recruitment

- Schedule and maintain a drip e-recruit marketing campaign
- Provide timely Recruit Status Reports
- Research competing firms and maintain database of findings

Advisor Business/Insurance Development Support: Learn the resources for all insurance solutions, and work closely with management team on providing support and solutions

Skills and Knowledge: Bachelor's Degree preferred

- Licensed advisor preferred – opportunity to build a client base
- Minimum 2 years' experience in insurance, investment management or similar financial services experience
- Experience with Microsoft Programs (Excel, Word, PowerPoint, Publisher)

Basic Qualifications: High School Diploma or GED required

- Minimum 2 years basic computer experience
- Insurance license preferred
- Securities license preferred

Benefits offered:

- Paid time off
- Health insurance
- Dental insurance
- Healthcare spending or reimbursement accounts such as HSAs or FSAs
- Other types of insurance
- Retirement benefits or accounts
- Parental leave

To be considered for this position you must meet at least these basic qualifications

The preceding job description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this job.

INCLUSION AND EQUAL OPPORTUNITY EMPLOYMENT

Symphonic Financial Advisors (and affiliates City National Rochdale and City National Bank) are equal opportunity employers committed to diversity and inclusion. All qualified applicants will receive consideration for employment

without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, veteran status or any other basis protected by law.

Symphonic Financial prefers all colleagues to be fully vaccinated against COVID-19 to work on-site at any of our locations.

Location : NW Briarcliff Parkway-MO

Location Street: 1251 NW Briarcliff Parkway, Kansas City, Missouri 64116

Country : United States

State : Missouri

City : Kansas City

Reports-To Manager : Shelly A Hall

Hiring Manager : Shelly A Hall

Salary Range : \$40k - \$50k

Full Time/Part Time : Full-time

Shift : Day

Shift Differential : No

Work Schedule : M-F, 8:30-5