# Petersen Hastings Investment Management

## CLIENT SERVICES COORDINATOR JOB DESCRIPTION

**Job Title**: Client Services Coordinator

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| Division: | Client Services | Wage Category: | Non-Exempt |
| Report to: | Financial Advisor | Date Closed: | Not yet determined |

## Job Statement

Under general supervision, the Client Services Coordinator fulfills the needs of our Clients by providing superior levels of care, including phone and face-to-face interaction, with unmatched professionalism, flexibility, creativity and attention to detail in our Kennewick, WA office. Client experiences create an emotional engagement and cannot be reduced to a core commodity. They are memorable, purposeful and consistent. Client Services Coordinator responsibilities include answering questions, providing directions, handling Client feedback/concerns, coordinating Client event/meetings including scheduling/reservations, preparing client account applications with corresponding paperwork, and other services to create a first-class experience for our Clients.

The position requires someone who is able to work in a fast paced environment where flexibility is key and directions can change frequently. The incumbent should be prepared to be flexible and assist in other duties where there are deadlines or unusual situations that require attention, as well as, perform other related duties and special projects as assigned. The Client Services Coordinator will act as a liaison between the Advisors and Investment Services Team as well as coordinate with all departments to ensure client experience excellence.

As a Petersen Hastings Investment Management Client Services Coordinator, you will be expected to exhibit a positive, friendly and helpful attitude and maintain a consistent level of professional quality and Client satisfaction that is unparalleled in the wealth management industry. The reality is every Client engagement is a Client experience. No exceptions.

## Essential Functions

1. Fulfills the needs of our Clients by providing exemplary Client care including phone and face-to-face interaction.
2. Performs first level Client assistance determination and resolution.
3. Utilizes designated software to record contact historical information.
4. Assists in developing and maintaining client relationship management procedures and documentation.
5. Maintains the daily calendar and schedule of the Advisor, proactively ensuring the Advisor is prepared for all meetings and activities (gathers necessary background information and materials prior to meetings/appointments).
6. Composes and prepares a wide range of confidential correspondence, forms, reports, presentations and other complex documents for senior management and Client audiences.

## Job Specifications

1. **Education-** college degree in business or related field highly preferred.
2. **Experience-** minimum of 3-5 years progressive administrative experience together with a proficiency in PC fundamentals, MS Windows, Microsoft Word, Microsoft Excel, PowerPoint, and Adobe Acrobat Writer. Prior investment experience is a huge plus.

- Client focused with a vision for quality and service excellence.
- Can do attitude with the Spirit to Serve.
- Works well both independently and in a group setting.
- Able to maintain a clean and professional appearance.

3. **Client Support, Assistance Determination and Resolution -**

- Listens attentively to the Client. Poses appropriate questions to facilitate assistance determination.
- Resolves and/or facilitates the resolution of Client inquiries and/or requests in a courteous, helpful and timely manner (or forwards to the appropriate support personnel) according to established procedures.
- Provides the Client detailed status information and estimated time to resolution as needed.
- Verifies a satisfactory Client experience with the Client as well as ascertain if further additional assistance is desired.

4. **Record Contact Historical Information-**

- Immediately enters all required call logging/tracking information into the system as defined by prescribed procedures.
- Utilizes system report capabilities to provide scheduled and ad hoc reports to management in a timely manner.

5. **Client Relationship Management Procedures and Documentation-**

- Recommends appropriate changes to methods and procedures based on recurring experiences.
- Provides necessary reports and/or data to support proposed developments in procedures.
- Communicates concerns and issues clearly and effectively to others.

6. **Development and Production of Various Management Reports-**

- Develops reports in the requested format in a timely manner.
- Obtains feedback from management regarding effectiveness and functionality of reports produced.
- Modifies reports as requested to reflect changes in data analysis and management needs.
- Provides necessary backup information and/or documentation to facilitate understanding of reports.

## Work Conditions

1. Travel is not required
2. Sitting for extended periods of time
3. Dexterity of hands and fingers to operate a computer keyboard, mouse, and to handle other office equipment.

# Petersen Hastings Investment Management

## Client Services Coordinator Job Advertisement

Petersen Hastings Investment Management's Kennewick, WA office is currently seeking a **Client Services Coordinator** to fulfill the needs of our Clients by providing superior levels of care, including phone and face-to-face interaction, with unmatched professionalism, flexibility, creativity and attention to detail. Client experiences create an emotional engagement and cannot be reduced to a core commodity. They are memorable, purposeful and consistent. The Client Services Coordinator responsibilities include answering questions, providing directions, handling Client feedback/concerns, coordinating Client event/meetings including scheduling/reservations, preparing client account applications with corresponding paperwork, and other services to create a first-class experience for our Clients.

The position requires superior communication capabilities as well as perseverance and creativity. This role is both demanding and rewarding. It involves the ability to be creative, diplomatic, and technically adept at the same time. We are an established investment management firm with a strong reputation for integrity, innovation, and quality. Our Client relationship efforts must reflect the best example of this image and the Client Services Coordinator is on the front line of making this happen.

If you have what it takes for this exciting position and would like to join a dynamic team of professionals then please send your resume referencing "Client Services Coordinator" in the subject line of the e-mail to Info@PetersenHastings.com.