



## **Financial Sales Assistant Position**

We are looking for a full-time licensed sales assistant that is highly energized and thrives in a busy environment. Candidate must be extremely professional in appearance and manner, willing to accept direction, quick to learn new things, and computer savvy. Superior phone and computer skills required. If you have someone in mind that would be an ideal candidate for this position, please contact us at 916.965.1879 or [nichole@bangerterfinancial.com](mailto:nichole@bangerterfinancial.com).

### **Essential Duties and Responsibilities (Additional duties may be assigned):**

- Perform general administration and support functions for the office as required
- Organize, coordinate, and maintain client paperwork
- Call clients and prospects to schedule appointments
- Attend events both day and evening and provide support 2 to 4 times per month
- Correspond with clients to complete new accounts, asset transfers, and other forms
- Handle routine matters for client accounts including processing name and address changes, account applications and bank authorizations, answering client questions via telephone and face to face
- Research and resolve client service problems for errors as needed
- Record all transactions on appropriate logs, set up client files and obtain necessary information

### **The Ideal candidate will possess the following skills:**

- College level courses in business/finance preferred
- Series 7 or 65 license required, with 1 year minimum experience (knowledge of terminology and practice)
- Ability to communicate with co-workers, clients and various business contacts in a professional manner
- Ability to investigate, research, and resolve problems and concerns, maintain confidentiality
- Ability to make rule-based and analytical decisions
- Ability to organize, prioritize and handle multiple tasks, paying attention to detail and meeting deadlines
- Ability to take complete and accurate notes, with excellent written and verbal communication
- Skill in operating various office equipment including personal computer, fax machine, copier, etc.
- Skill in utilizing various software packages such as Microsoft Office & Outlook

Benefits: Paid Holidays, Paid Vacation/PTO