

Professional Support Specialist



Company: ClearPath Advisors.
Job#: 2017-3
Positions: 1
Job Type: Permanent – Full Time
Location: Detroit Lakes, MN, USA
Category: Professional
Contact: Heather Malone

Job Description:

Our team is hiring a Professional Support Specialist. This position will be full time (40 hours per week). We are looking for someone who loves a challenge and is prepared to provide meaningful service to our clients. We take our work seriously - changing lives is an opportunity we cannot take lightly.

We want someone who has taken the time to learn about ClearPath Advisors and whose references will vouch for a strong work ethic, leadership, and an adaptable spirit.

This is a position with substantial opportunity to show off your skills. You must be highly self-motivated with the ability to ensure our clients are consistently receiving excellent service.

Skills/Requirements

Specifics about this role include:

- Monitor and manage the progress of multiple on-going projects
- Skill and comfort with **communicating the benefits** of our services to potential clients as part of the client onboarding and qualification process.
- Support the team in a variety of tasks that require attention to detail and strong problem solving skills.
- **Client Communications:** This position will be responsible for greeting and directing visitors, routing phone calls, and scheduling/confirming appointments. The candidate must possess exceptional customer service skills, and exhibit patience, courtesy and tact in dealing with confidential matters.
- Strong communication skills, both written and verbal, are required, as is the ability to work within a team framework.
- **Organizational skills:** the candidate should have computer skills, including familiarity with Word and Excel documents; this position requires maintaining client records in a variety of software programs.
- Process and complete forms for investment applications.

Must Haves:

- Demonstrated history of leadership, self-discipline, and self-motivation
- Detail-oriented with strong organizational skills.
- Excellent verbal and written communication ability.
- Team player (no lone wolves).
- Willingness to learn, grow and accept new challenges.
- Minimum, 2 year associates degree in business.

Other Desirables:

- Experience with QuickBooks, Outlook, Microsoft Office, appointment/scheduling software, tax preparation software
- Familiarity with Dave Ramsey philosophy
- Tech savvy

Please submit your cover letter with compensation requirements and resume no later than December 15th, 2017 [Extended] to:

heatherm@myclearpathadvisors.com