PLANNING SOLUTIONS GROUP
Exceeding Expectations in Wealth Management

Job Title:	**Client Relationship Manager / Executive Assistant**
Status:	**Full-Time**
Relevant Work Experience:	**1-2 years**
Job Category:	**Financial Services**
Licenses:	**Series 7, 66 and Life/Health (preferred)**

Job Description

About us -
We are a fee-based financial planning practice located in Maple Lawn, MD. Our holistic planning process, *The Family Wealth ContinuumTM,* is one of the most robust planning processes in the industry and centered on true planning. As a firm we focus on wealth management, asset management, estate preservation planning, business planning, and retirement plan consulting. Our clients are among the area's most prestigious professionals and organizations. Our team is cohesive, fast-paced, and professional. Together, we provide our clients with an extraordinarily high level of service.

About the position –
The ideal candidate will have a college degree in Finance, Business Administration, or a related field with strong technical and communication skills, as well as experience in financial services. This position's primary responsibility will be to provide comprehensive support to the partners of the firm through exceptional client service, which includes the ability to handle details, follow-through, and make clients feel supported and appreciated. In addition, this person must be organized, professional, and demonstrate a sense of urgency.

Job responsibilities -
- Address client service requests timely
- Proactively address Managing Partner's administrative needs
- Ability to handle sensitive & confidential information
- Assist with other firm administrative duties as needed
- Manage Partner's phone calls & calendar – schedule meetings, set-up travel, organize conf. calls, etc.
- Compose, edit, & proofread correspondence
- Research client issues & provide solutions to Partner, clients, and other advisors
- Review Managing Partner's email & delegate as needed
- Assist the firm with all aspects of marketing, including administrative duties for seminars
- Assign, track, & communicate client service requests
- Ability to communicate across all departments at PSG – including the Investment & Operations Departments
- Build relationships, engage clients during calls, & identify opportunities to increase revenue for the firm
- Maintain client database
- Other duties as assigned

We offer -
A robust benefits package, a supportive and professional environment, a salary commensurate with your experience, and an opportunity for professional development.
- **Health, Dental & Vision**
- **401K**
- **LTD & STD, Life Insurance**
- **Paid time off (PTO)**

To apply- Email your resume, cover letter, and salary requirements to Bill Bruns at wbruns@psgplanning.com
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