CLARK

FINANCIAL PLANNING

JOB DESCRIPTION:

JOB TITLE:	Administrative Assistant
Name:	
Office Location:	908 Baltimore Street, Hanover PA 17331
Reports to:	Sarah A. Clark
Classification:	Non-exempt, Full Time
Revision Date:	

POSITION SUMMARY: Administrative Assistant

ESSENTIAL FUNCTIONS: Maintain continuity in the practice by facilitating administrative tasks.

ADMINISTRATIVE/DAILY ACTIVITY:

- Answer phones and greet clients
- Assist clients with general questions, submit and follow up on service related requests
- Maintain professional attitude
- Prepare for client meetings including organization of client reports through A360 the Client Relationship Management System (CRM)
- Communicate with clients both in person, phone and email
- Meet frequently with advisor to keep on top of workflow
- Copying, scanning, faxing
- Record client information and notes into CRM
- Maintain compliant client files
- Marketing projects
- Review applications
- Maintain advisor calendar
- Order supplies
- Special projects and assignments assigned by supervisor

NON-SECURITIES APPLICATIONS:

- Prepare and submit applications for life, disability, annuity and long-term care.
- Follow up on all completed applications to ensure they are in good order.
- Order life insurance exams through examiner if required.

- Communicate with agency new business administrator and track process through tools provided by MassMutual
- Work with home office, new business administrator, agent and client through application submission to delivery of policy and return of all post-issue requirements.

INVESTMENT APPLICATIONS:

- Prepare and submit applications for investments and track progress to completion
- Work with MMLIS Broker Dealer and Agency Office of Supervisory Jurisdiction (OSJ) as needed
- Answer client questions
- Provide service forms including, but not limited to distribution forms, periodic investment forms, surrender forms, beneficiary forms, fund transfer forms, etc. (these are examples of post-issue services and are not all-inclusive)

OTHER FUNCTIONS:

- Complete other duties as assigned by supervisor

MINIMUM JOB REQUIREMENTS:

- High school diploma or equivalent
- 1-3 years' prior industry experience preferred, but not required
- Proficient in English
- Excellent communication skills, both written and verbal
- Excellent computer skills. Must be proficient in ***Word, Excel, Outlook***
- Accurate typing skills and attention to detail
- Must be able to work with different personalities
- Must portray a professional appearance
- Highly organized, able to take direction, manage multiple tasks and meet deadlines.

SPECIALIZED KNOWLEDGE; LICENSES, ETC

- Associates who want to solicit insurance for and receive commissions from the insurance company, in addition to the same duties as any other licensed person, must hold a Life & Accident /Health License and must by contracted with the insurance company.

WORKING CONDITIONS:

- Office environment
- Sitting and standing for periods of time
- Prolonged use of computer
- Mobility required; frequent bending, lifting and stretching
- Ability to lift 10 to 25 pounds

This job description is only a summary of the typical functions of this position. It is not an exhaustive or comprehensive list of all possible job responsibilities, tasks and duties. The responsibilities, tasks and duties of the jobholder might differ from those outlined in the actual job description and that other duties, as assigned, may be part of the job. This job description does not constitute an employment contract; the employment relationship between Clark Financial Planning and the employee is an at-will relationship.