MERIDIAN
Financial Partners
Clarify the path. Enjoy the journey.

*Send application requirements to info@meridianfp.com*

# MERIDIAN FINANCIAL PARTNERS, LLC
## *Client Support Specialist*

### About Meridian Financial Partners

Headquartered in Warrenton, Virginia, Meridian Financial Partners provides holistic financial solutions to individuals and organizations nationwide. The firm offers deep expertise and services in investment management, financial planning, and strategic integration of financial resources.

Meridian is one of the rare few that offers completely unbiased guidance and solutions to help clients create and manage a clear financial path to their life goals. The firm's partners have earned the unwavering trust of many long-term clients, who enjoy financial peace of mind as a result of the knowledge, customized care and—most especially clarity—that Meridian consistently delivers.

### Position Overview

This position is a salary plus bonus position supporting two high achieving financial advisors by providing client service support, as well as administrative and operational assistance. Experience in the field is preferred, although not required. This position reports directly to the firm's partners.

### About You

You are a friendly and easy going colleague. You want to be an important part of a successful, positive team, and you thrive in a fast-paced, exciting, professional environment. You will help us deliver confident, engaging, and productive client experiences, by assuring that important backstage functions are well executed. You have strong organizational, analytical, and computer skills. You can professionally and effectively communicate with our clients, building strong relationships. You also value our clients' privacy and know how to maintain client confidentiality; client information should not be discussed with others outside of our firm.

### Job Responsibilities

- Follow and fully support Meridian corporate values
- Serves as the first point of contact for incoming calls and client interactions
- Provide exceptional service to all our clients by answering operational and administrative questions, and by responding to requests from clients for documents, forms, prospectuses, statements, etc.
- Prepare client presentations and materials as needed by partners
- Oversee daily workflow, projects, and scheduling to ensure smooth office operations
- Schedule and confirm client appointments
- Provide pre-appointment paperwork to prospects/clients and prepare advisor with necessary paperwork prior to client appointments

- Open, maintain, update, close, and archive client files
- Maintain marketing database, mailing lists, and assist in production of marketing materials and correspondence, and ensure fulfillment of marketing campaigns
- Become proficient in all necessary computer applications and assist in seamless data integration/maintenance
- Assist with IT and compliance issues as needed
- Process incoming correspondence, mail, and email

## Experience/Skills Required

- Self-motivated and hardworking
- Supremely organized, attention to detail a must
- Strong analytical and computer skills (Microsoft Word, Excel, PowerPoint, and Outlook)
- Fast adopter of new technologies
- Able to build meaningful relationships with our clients
- Working knowledge of investment and financial terminology preferred
- Polished administrative and office management skills
- Able to follow existing systems and create new ones
- Intellectually curious and fast learner
- Effectively complete tasks within deadlines
- Personable, comfortable engaging clients as a regular part of daily duties

Minimum 3 years as an administrative assistant or customer service representative is required. Qualified candidates will have an Associates degree, with a Bachelor's degree preferred.

## Compensation

We offer an excellent compensation package and an opportunity to be rewarded for great results.

## To Apply

Send resume, cover letter and salary requirements. Three professional references must be available upon request.