BLBB Advisors
FINANCIAL GUIDANCE SINCE 1964℠

Client Service Administrator

BLBB is looking to expand its client service capabilities with the addition of a new Client Service Administrator. Our new hire will be a part of a client service and operations team whose primary responsibility is working with our Financial Advisors on client communication and portfolio administration.

Responsibilities present the opportunity for frequent, professional, and detail-oriented communications directly with our clients; often as a first line of customer service. A successful Client Service Administrator at BLBB possesses a forward-looking proactive approach and enjoys a balance of working independently and as part of a team. The client service team supports one another through collaboration and cross-training with their job function as well as possible support in financial planning, operations, compliance and client events.

Primary Responsibilities:

- Provide excellent customer service experience to both new and existing clients, prospective clients and centers of influence
- Manage the daily flow of non-investment-related client inquiries, money movement requests, and account maintenance using custodial interfaces (such as Fidelity, Pershing, Schwab and TradePMR)
- Monitor client account activity and system settings, including client account cash levels in the portfolio accounting system and custodians, identifying and resolving issues
- Coordinate prospect and client meetings, including appointment preparation, greeting clients, and necessary follow-up
- Manage the production, distribution, review, and submission of new account paperwork, contracts, and transfer forms, both in hard copy and electronically (DocuSign)
- Capture client notes, communications and task management in the firm’s CRM system
- Maintain risk awareness and compliance, minimizing risks to yourself, your financial advisors, your clients, and the firm
- Coordinate distribution of quarterly portfolio reporting and billing statements
- Support the firm’s initiatives by assisting with any company-wide projects and activities including occasional attendance at firm functions

Required Knowledge, Skills, and Abilities:

- Exceptional representative of firm brand and client experience ambassador
- Growth mindset open to learn new processes and procedures including industry specific language and technology
- Effective and professional communication skills both in person and virtual
- Familiarity with broad investing-related concepts

- Task-oriented with attention to detail, follow-up and organization
- Proficiency Microsoft Office Suite, including basic Excel skills and work-related experience within Outlook
- Ability to maintain a high level of confidentiality
- Willingness to learn and adapt to changing systems and technology

Additional Knowledge, Skills and Abilities Considered:

- Experience with any of the following platforms: Envestnet Tamarac, Pershing Advisor Solutions NetX360, Fidelity Wealthscape, Charles Schwab Advisor Center, TradePMR Fusion and SugarCRM

Education and Experience Preference:

- Three to five years of relevant career experience (Registered Investment Advisor, Broker/Dealer preferred)
- Retail banking experience considered
- Bachelor's degree or equivalent industry experience

Benefits:

- Company paid individual health insurance, company-subsidized family health insurance
- Company funded Health Savings Account
- 401(k) and Cash Balance plans with 10% employer contribution
- Long Term Disability and Life Insurance
- Flexible Paid Time Off
- Charitable Gift Matching and Volunteer Incentive programs
- Collaborative and supportive corporate culture

About BLB&B Advisors, LLC

Located in Montgomeryville, PA and founded in 1964, we are an independent, employee-owned, multi-custodial financial advisory firm providing fiduciary advice, planning, and investment management services to individuals and families, endowments, and business owners. BLB&B Advisors works with more than 1,400 clients in more than 40 states and manages approximately $2.5 billion dollars as of March 31, 2024. The firm was included on the 4th Annual CNBC FA 100 list, which ranks and recognizes advisory firms that take a holistic approach to supporting their clients through all of their life transitions including, but not limited to, financial planning.

We work closely with our clients to help guide them through all aspects of their financial lives.
For more information about joining our team, visit www.BLBB.com.

If interested, please contact Cory Jackmuff at cjackmuff@blbb.com