

BLB&B Advisors, LLC
Senior Client Service Administrator

Position Overview

As a Senior Client Service Administrator at BLB&B Advisors, LLC, you will provide full client service support to two Financial Advisors. Primary, day-to-day responsibilities include (1) client onboarding and maintenance in custodial, portfolio accounting, and CRM systems, (2) non-investment-related client requests including money movement and scheduling, and (3) collaboration with, mentoring of, and leadership for other client service administrators and operational employees.

Responsibilities are administrative in nature and involve frequent, professional, and detail-oriented communications with clients via phone, email, and in person visits. Proactive approach and forward-looking personality necessary for success.

Job Details

Job Type: Full Time, FLSA Exempt
Job Location: Montgomeryville, PA
Reports to: Clifford Haugen, President

Major Areas of Responsibility:

- Manage the daily flow of non-investment-related client inquiries, money movement requests, and account maintenance requests using custodial interfaces (primarily Pershing, Fidelity, and TradePMR)
- Monitor client account activity and settings, including client account cash levels, in the portfolio accounting systems (Tamarac, custodians), identifying and resolving problems
- In situations where required, track principal and income balances and trust disbursements
- Coordinate prospect and client meetings, including appointment preparation, greeting clients, and supporting the completion of required paperwork including the customization of existing meeting template documents
- Manage client onboarding including the production, distribution, review, and submission of new account paperwork, contracts, and transfer forms, both in paper and electronically (DocuSign)
- Diligently manage and document workflows and communications in the CRM system (Sugar)
- Maintain risk awareness and compliance, minimizing risks to yourself, your Financial Advisors, your clients, and the firm; identify and work to resolve issues in a timely and compliant manner; modify processes and procedures so that particular issue never recurs
- Participate on various operational and compliance committees as requested ensure CSA voice is represented
- Support the firm's initiatives, assist with any company-wide projects and activities, and attend functions as needed

Required Knowledge, Skills, and Abilities:

- Exceptional client service skills and ability to communicate effectively and professionally
- Critical thinking and precise attention to detail absolutely required
- Follow-up to ensure correct and timely resolution and completion of tasks
- Familiarity with IRA rules, trusts and estates, investment-related accounting concepts
- Proficiency with Outlook, Excel, Word, and PowerPoint
- Able to adapt to changes in the work environment and manage competing demands
- Position requires a high level of confidentiality

Education and Experience:

- Eight to ten years of relevant experience (Registered Investment Advisor, Broker/Dealer, Legal/Trusts and Estates, Banking) preferred
- 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
- Paid Time Off
- Charitable Gift Matching and Volunteer Incentive programs
- Collaborative and supportive corporate culture

About BLB&B Advisors, LLC

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 1,000 clients in more than 40 states and five counties and manages more than \$1.6 billion dollars. The firm has been named to the Financial Times list of Top 300 RIA firms in the country for the past four years in a row.

We work closely with our clients to help them navigate all aspects of their financial lives. Financial planning is used to develop appropriate investment objectives which lead to the construction and management of client portfolios. BLB&B Advisors uses individual stocks, individual bonds, and Exchange Traded Funds as the basis of portfolio construction.

Interested individuals should submit applications through LinkedIn or directly to cjackmuff@blbb.com.

For more information, visit www.BLBB.com.

BLBB is an equal opportunity employer.