Client Service & Operations Administrator

This position will report to the Director of Client Service and Operations in the Westwood, MA Office and will assist in daily administrative overflow from any team members.

Primary Responsibilities

- Scanning – Any items in the bin or as presented as a result of in-service meetings. Includes scanning check deposits.
- Maintain Client Service & Operations Inbox for documents and posting
- Support Client Service and Operations (which includes the use of Excel)
- Assist Client Service Associates with forms and DocuSign
- Prepare and mail client letters, reports and other deliverables
- Label Account Attributes
- Assist Director with yearly projects
- Prepare Client Service Packets
- Order supplies for the Westwood office

Secondary Responsibilities

- Serve as backup for phones and reception desk
- Participate in Client Service and Operations projects as needed

Aspirational and Developmental

- Obtain the Financial Paraplanner Qualified Professional (FPQP) Certification within two years of employment
- Participate in monthly coaching and mentoring
- Contributing participation in the quarterly Operations brainstorming meetings

Requirements

- Proficient in Excel
- Detail oriented
- Bachelor's degree preferred, but not required

To apply, please send a cover letter and resume to:
Jennifer Watson, Director of HR, at jwatson@heritagefinancial.net