

Job Title:	Client Service Team Member	Travel Required:	No
Location:	In-Office	Position Type:	Full Time
Will Train Applicant(s):	Training will be provided		

EMAIL: rachel@christycapital.com	LOCATION: Christy Capital Management, Inc. 2939 McManus Road Macon, GA, 31020
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Job Description: CCM is currently searching for a detail-oriented individual with the desire to serve clients and co-workers with excellence as a Client Service Team Assistant. This individual will have an opportunity to work in a fast-paced environment alongside a caring, compassionate, and supportive team. We require an individual that will approach work, interactions, and relationships in a manner consistent with our company's core values. Financial experience is not required as we provide training and opportunity to learn within the company.

ROLE AND RESPONSIBILITIES

- Professional level verbal and written communication skills
- Ability to organize daily workload by priorities and complete multiple time-sensitive tasks
- Maintain current and thorough account records
- Help prepare for meetings and attend meetings when needed
- Managing Financial Planner's calendar

REQUIRED SKILLS

- Detailed with strong organizational skills
- Excellent Customer Service Skills
- Communicate clearly and concisely in both speaking and writing
- Ethical with ability to discreetly handle confidential data
- Intelligent with aptitude to continue learning new things
- Capability to excel in a team environment as well as working independently
- Computer literacy/skills with knowledge of specialized office programs, and strong proficiency within Microsoft Office products (Excel, Outlook, Word)
- Minimum 5 years office experience preferred

Reviewed By:		Date:	
Approved By:		Date:	
Last Updated By:		Date/Time:	