LIFE FINANCIAL GROUP
Wealth Management from a Biblical Worldview

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Client Experience Coordinator

Simply put, this position is responsible for providing the absolute best client experience with our firm.

Responsibilities Include But Are Not Limited To:

- **Inbound calls**: The Client Experience Coordinator (CEC) will receive all inbound calls in a professional energetic manner. In each conversation, they will support the caller in obtaining the information that they need. This includes transferring the caller to the right person to answer a question or committing to gather that information and promptly relaying it to the caller.
- **Office Visits**: The CEC will know who is expected to visit the office each day. They will go out of their way to greet each visitor (anticipated and unanticipated) in a warm manner. Think of 5-star hotel concierge services! Just like a concierge, they will go above and beyond to make sure our clients are well taken care of during their office visit. All guests are to be greeted by name and engaged in welcoming conversation. Upon departure, the CEC will walk the guest to the door and bid them a good day.
- **Client Celebrations**: The CEC will work with the Advisory team to prepare birthday and anniversary cards for our clients. The CEC will also help schedule Advisor/Client dinners to celebrate milestones. The CEC will also learn about and walk with our clients through the difficult parts of life and when appropriate they will pray with them. They will share prayer requests from our clients and will follow up with these clients to let them know of our sincere concerns. They will provide updates to our staff about the progress of the client through any challenges.
- **Staff Celebrations**: The CEC will be in charge of planning staff birthday celebrations. This includes but is not limited to starting cards to go around the office for the rest of the staff to sign, and purchasing and/or preparing refreshments for staff meetings when birthdays are celebrated.
- **Conference Room Utilization**: Coordinate the schedule for our three conference rooms. This also involves making sure the rooms are prepared and maintained before and after each meeting. The conference rooms are to be warm and inviting meeting spaces.
- **Other**: The CEC is tasked with coming up with unique/creative ways to celebrate our clients and staff.
- **Job Requirements**:
    - Positive can-do attitude! We can teach many things about the job, but we can't teach someone to be upbeat and pleasant
    - Patience & confidence when dealing with challenging situations
    - Customer Centric
    - Extraordinary phone, communication & listening skills
    - Computer Skills – must have a proficient knowledge of Microsoft Office suite of applications (Word, Excel, Power Point). Types 70+ words per minute
    - Strong command of grammar and spelling
    - Professional attire required
    - Problem-solving skills

Why We Need this Role Filled

We are a busy financial services office, serving clientele nationwide. From our growing financial services clientele and nationwide church-seminar ministry to our tax services division, our organization has experienced exponential growth within the last three years and we are looking to enhance our team with this specialized position. Our desire is to have the right person help augment the gifts and skills of our current Operations Team.

Job Status & Compensation Philosophy

This is a full-time position, which may offer infrequent local travel opportunities. This is a fun and rewarding position, working with some excellent people who like to work hard and have fun. We believe in compensating team members based on the way they add value to our business, not on their credentials or pedigree. If you would enjoy being a valued part of our team, we would love to hear from you. Job may require infrequent overtime. Starting salary is dependent upon experience and skill-set.

How to Apply

Please email Drew@TheLifeGroup.org. Include your resume and a cover letter which includes a paragraph or two that explains how you see yourself fitting into our company and culture.

About Us

The Life Financial Group is a Christ-centered wealth management firm that exists to help families become even better financial stewards of God's gifts. Since 1978, The Life Financial Group has provided professional, Biblically sound financial services, counseling, and education to the Christian community.

The Life Financial Group believes it is important for Christians to have every aspect of their lives transformed by the application of Biblical truths. This includes the way money is viewed, managed, and invested. We believe that all things belong to God, including our money, and we should exercise Biblical stewardship over all our resources.

Visit www.TheLifeGroup.org for more information!

Additional Divisions of The Life Group:
www.LifeInstitute.org
www.BeaconTax.org