



**SHELBY COUNTY
STATE BANK**
MEMBER FDIC

JOB POSTING: FINANCIAL ADVISOR ASSISTANT

Shelby County State Bank is seeking an experienced financial advisor assistant to join our investment firm to help service and continue to grow our client base in our Shelbyville and remote offices. As a financial advisor assistant, you will work side by side with a financial professional to help clients meet their financial goals.

The Financial Advisor Assistant will be responsible for providing administrative and operational support to the Financial Advisor in a fast-paced financial planning office. The ideal candidate might be someone who is looking to begin a career in the financial service industry. You will be able to grow in an environment where you can learn skills, help people, and make a significant contribution to the team without the typical pressure from sales or prospecting activities.

The Financial Advisor Assistant will assist the team in many areas of our financial planning practice, including answering in-bound calls, preparing new account and service paperwork, manage multiple computer systems in a paperwork-intensive environment, providing customer service both in person and over the phone, facilitating and resolving client service requests, scheduling client meetings, generating and mailing correspondence, and completing other administrative tasks as assigned.

Responsibilities include:

Assist Financial Advisor with daily activities, including maintaining calendars, preparing correspondence, and providing friendly, professional customer service.

Interact with clients in person and over the phone.

Prepare and review new account paperwork.

Facilitate and resolve client service requests.

Apply a working knowledge of operations/client-service processes.

Work independently, effectively, and efficiently.

Ensure paperwork is prepared and provided for all client meetings.

Manage confidential and/or sensitive information responsibly.

Maintain administrative functions of the office such as office supplies and mail.

Perform other duties as assigned.

Experience/Skills:

Detail oriented and able to work in a fast-paced environment.

Committed to communicating and providing exceptional customer service.

High degree of comfort managing multiple tasks simultaneously.

Strong character and positive mindset.

Ability to effectively prioritize workload and meet deadlines.

Proficient with Microsoft Office with a major focus in Excel.

Experience with CRM (Customer Relationship Management) Systems

Position Details:

Full-time/Salary Position

We offer a competitive salary and benefit package, including medical, dental, vision, life, LTD, STD, Cancer, Accident; 401(k) & Retirement Plan; Paid vacation, personal and sick time.

Candidate will be subject to fingerprinting, background screening and personal credit verification.

Shift/Schedule:

Day Shift; Monday to Friday: 8am – 4:30pm with some flexibility; daily lunch break

Shelby County State Bank is an Equal Opportunity Employer