

North Star Resource Group Position Description

Position: Practice Coordinator
Reports to: Director of Client & Customer Services, Lone Star
FLSA Status: Non-Exempt

Purpose:

The purpose of this position is to manage the administration portion of the Associate's Practice.

Essential Functions:

Administrative Assistant Tasks:

Client Interaction / Correspondence

- Client Review Scheduling: Setting / Confirming / Rescheduling Appointments
- Prepare letters of instruction
- Handles basic service instructions from client meetings
- Answer phones

Policy Servicing

- Confirmation of new business
- Prepare annual review letters
- Preparing all client information for meetings

Administration / Record Keeping

- Prepare Client Position Statement (CPS) and review for accuracy
- Add client notes to system
- Assist in preparing paperwork, submit, track and record transferring existing clients to Brokerage Platform and Managed Account Platform
- Prioritize cases (identify what parameters dictate high priority)
- Assist in completing applications (Insurance and Securities)
- Assist in preparing materials for policy options letters
- Basic service work

Tracking

- Tracking review and follow up on service cases
- Processing oversight (to ensure process meets desired time frame)
- Track business goals

Marketing

- Assist in seminar planning and coordination

Created By	Sources	Last Updated
Human Resources Manager	OMAT	October 2017

Other Duties

- Run illustrations
- Advisor calendar management
- Executive level travel arrangements
- Copying, filing, faxing
- Prepare marketing letters / emails
- Ordering literature / supplies
- This list is not all inclusive

Required Skills and Experience:

Minimum requirements in terms of educational background, work experience, licenses / certifications or other knowledge, skills and abilities.

- Four year degree or equivalent work experience
- Good computer skills
- Strong Microsoft Excel experience
- Excellent verbal and written communication skills
- Good customer service skills
- Maintains confidentiality of information
- Ability to coordinate multiple tasks and priorities
- High attention to detail
- Microsoft Word required

This description covers the primary and principal duties of the job. It is not intended to give all details or a step-by-step account of the way each procedure or task is performed.

Additional Skills and Experience:

- Good organizational and demonstrated problem solving skills a plus.
- Microsoft Outlook preferred
- Knowledge of insurance / financial services industry
- Securities Licenses

