CLIENT RELATIONS CONCIERGE
ROLE DESCRIPTION

Role Title	Client Relations Concierge
Reports To	Financial Paraplanner
Application Deadline	July 16, 2021

ABOUT LVZ

Since our founding in 1960, LVZ remains constant in our mission to deliver peace of mind for whatever comes next in every subset of our firm. We started as a small firm that sold mutual funds - since then, we have expanded to managing multi-million-dollar portfolios and offering comprehensive financial planning services. Our firm has grown to over $800 million in assets under management across multiple independent broker-dealers.

LVZ seeks an intuitive professional that delivers extraordinary experiences through anticipating and supporting clients' needs in all our firm's subsets. This role acts as the face of our brand and plays a vital role in client satisfaction, communication, and retention.

LVZ operates on five core values that define the culture of our team. You are the right culture fit if you…

- Foster a welcoming and respectful environment for team members and clients.
- Create extraordinary client experiences that exceed expectations.
- Operate on a foundation of integrity and clear communication.
- Pioneer new ideas and processes as a result of perpetual learning.
- Give generously of time, talents, and treasure to serve our communities.

Learn more about us at www.lvzfinancialplanning.com or www.lvzadvisors.com.

ESSENTIAL FUNCTIONS

- Answer and direct incoming calls per client requests, relay messages as needed.
- Welcome and assist clients and guests in our Holland office.
- Complete direct client servicing tasks.
- Maintain accurate information in our Client Relationship Management (CRM) database.
- Process incoming and outgoing mail.
- Manage personalized client communications.
- Organize, process, and file client paperwork.
- Assist with preparing for client plans and meetings.
- Gather and input client information.
- Ensure the lobby area and conference rooms offer a clean and welcoming environment.
- Operate within industry and organizational policies and procedures.
- Schedule and coordinate client and team meetings.
- Attend and assist with firm events and team meetings.

QUALIFICATIONS

- An effective communicator, both written and oral.
- Self-motivated, excellent organizational skills, detail-oriented, ability to prioritize and meet deadlines.
- Proficiency in Microsoft Office programs, DocuSign, Redtail (CRM) and Orion preferred.
- Welcoming personality that is respectful for a diverse spectrum of clients and colleagues.
- Ability to listen, have empathy, and assess all types of situations.
- Operates with the highest level of integrity and confidentiality.
- Thrives on going above and beyond to exceed client expectations in their interactions.
- Collaborate with marketing, compliance, and financial planning teams.
- Ability to create and improve processes.

Hours	Full Time, 8:00 AM – 5:00 PM
Salary	Starting at $36,000/yr.
Benefits	Paid [individual] health insurance Two weeks paid vacation Three paid personal days LVZ Profit sharing retirement contributions
To Apply	Submit your resume, cover letter, and 2 professional references as application for this role to hello@lvzadvisors.com, subject line: **'Client Relations Concierge – Applicant Name'**.

PEACE OF MIND FOR WHAT EVER COMES NEXT.