

## Job Description

Employee Type	Full-Time Exempt
Department:	Advisor Team Support
Job Title:	<b>Advisor Team Support Representative 1</b>
Reports To:	Advisor Team Support Manager
Manages Others:	No
Minimum License(s):	None
Date:	6/24/2021

## Nature and Scope

This position is a key component of managing the support channels for the company. The Advisor Team Support Representative is required to work collaboratively with the affiliated financial professionals, their staff, and clients in addition to Home Office Employees of United Planners. Many of the duties are directly related to managing tasks effectively to achieve satisfactory results for the clients.

## Essential Duties and Responsibilities

- Effectively manage the existing customer support channels and processes for the firm via phone, email, online cases, etc.
- Remain dedicated to the front lines of the company's phone support initiative by participating in incoming and outgoing phone calls
- Competently draw out key information from advisors and staff to effectively provide a high level of customer service and achieve satisfactory results
- Resolve agent challenges through proactive investigation of issues that can include partnering with other departments
- Assist with troubleshooting, installation, and implementation of systems
- Thoroughly and accurately escalate unresolved issues to the next tier of support personnel
- Astute and analytical; always operates with the understanding that knowing and adapting to the audience is the key to effective communication
- Train advisors and their staff on United Planners platforms and their affiliated partner's technology
- Assist the IT department with projects to grow the technology infrastructure of the organization
- Provide input and recommendations to the organization surrounding software technologies and how these technologies can assist the business, being especially proactive with new technologies
- Provide accurate, valid, and complete information by using the right methods and tools
- Follow communication procedures, guidelines, and policies
- Additional duties may be assigned as needed

## Education and Experience

- High school diploma or equivalent
- 1-2 years of customer service experience required

## **Qualifications**

- Skilled in Microsoft Office applications
- Proficient in both Windows and Mac operating systems
- Experienced with client relationship manager tools and case notes, including but not limited to, Salesforce and Redtail preferred
- Demonstrated computer literacy and utilization of online resources
- Possess a positive attitude and be customer-centric
- Excellent verbal and written communication skills
- Ability to work in a collaborative, team-based culture
- Proven skills in the areas of time management and organization
- Versed in following technical procedures
- Ability to provide a high level of attention to detail in order to adhere to procedures and guidelines
- Self-motivated, ability to handle diverse tasks and responsibilities
- Passionate, optimistic, and has internal inspiration for technology business solutions