

## POSITION DESCRIPTION

### ADVISORY BILLING SPECIALIST

United Planners is a national wealth management firm that provides financial planning, investment management and insurance services. Established in 1987, United Planners is proud of its true independence and its stance of being “**Adamantly Not For Sale**” because it is 100% owned by its employees and financial professionals. United Planners provides back-office support to independent financial professionals, who then help investors manage their wealth to achieve a variety of goals and objectives. United Planners is uniquely structured as a limited partnership that offers ownership opportunities and profit sharing to its employees and financial professionals. We embrace a culture, passion and strategy that caters to the fiercely independent financial services community. United Planners is an open-architecture model that offers flexible, efficient and scalable solutions to position its financial professionals to build and manage profitable businesses. United Planners is Registered Broker-Dealer with the Financial Industry Regulatory Authority (FINRA) / Registered Investment Advisor with the Securities and Exchange Commission (SEC) / SIPC Member.

United Planners is currently seeking a qualified professional to join our Accounting and Compensation Department in Scottsdale Arizona as an **Advisory Billing Specialist**. This qualified professional will be a critical team member and must be flexible and multi-talented to fulfill a broad range of responsibilities. This position is primarily designed to focus on the following areas: advisory fee billing of client accounts, data management, operations, new advisor transition and onboarding, new account setup, and quality control review. This position will work with internal and external relationships. Below is a summary that includes, but is not limited to the following details that relate to this position:

#### A. Core Duties and Responsibilities

1. Serve as an internal subject matter expert on Orion platform and advisory billing solutions.
2. Play an integral role in the day-to-day management of the Orion platform and develop insights and create solutions to support advisors, administrative staff, and home office personnel.
3. Educate and train advisors, administrative staff, and home office personnel on the Orion Platform.
4. Establish and maintain advisors on the Orion Platform, which includes their billable accounts, fee schedules, reports, client portals and other features.
5. Assist advisors with general servicing issues.
6. Facilitate and support monthly and quarterly billing processing and data reconciliation.
7. Provide departmental infrastructure support (e.g., filing, reporting, system maintenance, etc.).
8. Capable of multi-tasking daily responsibilities as well as assigned projects.
9. Review documents, conduct research and perform special projects as assigned.

#### B. Qualifications

1. Professional written and oral communications skills.
2. Creative and analytical skills.
3. Ability to work equally well in a team environment and/or independently.
4. Ability to successfully meet critical deadlines and effective time-management.
5. Ability to effectively present information to groups of peers, managers, and registered representatives.
6. Ability to effectively utilize current Microsoft Office tools including Word, Excel, and PowerPoint.
7. Ability to derive practical solutions to problems with a variety of variables in situations where only limited standardization exists.
8. Ability to initiate self-development including continued understanding and application of new regulations, policy changes, and if applicable, additional licensing and coursework to adapt to changes in industry and job demands.

**C. Education and Experience**

1. Bachelor's degree is desired, but not required.
2. A combination of education and experience is helpful.

**D. Licenses**

1. Series 7 (preferred, but not required).
2. Series 63, 65 or 66 (preferred, but not required).

**E. United Planners offers competitive salaries and an excellent benefits package that includes:**

1. 401(k) with company match.
2. Company paid short/long-term disability and life insurance.
3. Medical including dental and vision.
4. Paid vacation, sick time, personal time off and holidays.

**F. Physical**

1. Extensive computer-work that requires long periods of time at a work-station (i.e., being seated and stationary; focusing on a screen; typing; email correspondence; training sessions such as webcasts and demos).
2. Customary mobility around the office (i.e., traveling up and down stairs; walking; moving occasional office items, boxes, chairs, desks and other office equipment as well as attending meetings).
3. Extensive phone-work since most of our client servicing is geographically across the country.

For more information, please contact Human Resources at [rmedina@upfsa.com](mailto:rmedina@upfsa.com) or 480-378-2703.