STERLING
WEALTH MANAGEMENT

<u>Executive Administration & Client Service *Description*</u>

A Sterling Associate in Executive Administration and Client Service (EA) requires mature client relationship skills to handle non-advisory questions and concerns from clients, the ability to manage multiple priorities, as well as to be a "brand ambassador" to our clients and community. Excellent communication abilities are essential in this role. The EA is responsible for monitoring all connections with clients, evaluating client engagement, and continually looking for ways to enhance their experience with Sterling.

The EA position does not require advisory knowledge, but a background understanding of financial services is helpful. EA's may not necessarily attend client advisory meetings but will be a bridge between firm operations and how clients interact with the firm to ensure that initiatives for our clients are delivered upon in a timely manner. In this role, being able to manage non-advisory client follow up and the operational items that require completion for our clients is very important.

An ideal EA is highly organized and is detail oriented. This individual provides support to firm executives, team members and clients by performing a variety of complex duties in the areas of client service and office administration.

Typical Duties, Responsibilities, and Skills Needed to Succeed:

- Exercises personal integrity and ability to discreetly handle confidential data.
- Utilize client relationship management software (CRM) to effectively manage our important relationships. These responsibilities will include (but are not limited to):
    - Maintaining the system
    - Working with the Chief Operating Officer to create operational efficiencies utilizing the software
    - Update client records to reflect all we know about a client and how we can proactively celebrate life with them
- Partner with the operations/service team to assist clients and advisory team with client non-advisory questions and paperwork such as processing forms and applications (e.g. opening accounts, account address change forms, and other online applications necessary to process clients' business transactions); assisting in making client deposits, withdrawals, and transfers; work with the operations team with the preparation and delivery of Quarterly Investment Reviews; and generating various client reports as needed.
- Track client service issues and new business transactions in progress and report regularly to the team.
- Work with the CEO and planning team to create tailored annual connection plans for each client, ensuring that the plans are being followed and assisting in the creation of processes to create efficiencies as necessary.
- Continually seek out ways to improve client experiences with the firm.
- Along with the CEO and COO, develop and execute on communication outreach plan for the firm. May include digital presence, events, and other community involvement.
- Excellent communication skills with ability to organize and express thoughts clearly and concisely in both speaking and writing as the EA is often the initial point of contact with the firm.

- Assist with the quarterly client newsletter and other marketing materials as appropriate.
- Responsible for documenting and ensuring our service standards.
- Adeptness at prioritization and proactive planning with ability to complete multiple time-sensitive tasks, responding to urgent needs.
- Proven excellent computer literacy/skills and ability to work with specialized software programs. Strong proficiency within Microsoft Office products, specifically Excel, Word and Outlook is desired.
- Aptitude and passion for learning new things quickly with a strong work ethic in an ever-changing environment.
- Capability to excel in a team environment as well as working independently.
- Proven strong organization, technical and analytical skills with keen attention to detail.
- Other duties as assigned.

Collegiate background in Management, Business, Finance, or Accounting or equivalent work experience is preferred. A minimum of three (3) years' prior experience in executive support, client service management, or within a financial, investment, banking, or accounting firm is strongly preferred. The successful candidate will be comfortable in an environment that requires flexibility and responsiveness.

Interested candidates should send their resume and cover letter to hello@sterlingwealthmangement.com. Any additional questions should be directed to Sharon Allen or Martin Allen at Sterling Wealth Management at 217-398-1900.