



# Client Service Specialist

## POSITION: Client Service Specialist with Mindful Asset Planning in Apple Valley, MN

**Who are we?** Mindful Asset Planning (MAP) is a comprehensive financial planning and fee-only fiduciary firm that always acts in our clients' best interest. MAP provides customized personal financial planning advice to individuals, families, and businesses. Established in 1988, MAP has acquired the depth of knowledge and experience necessary to inspire clients of all ages and economic stages of their lives who seek a significant benefit from expert guidance.

MAP's unique comprehensive planning process integrates a therapeutic approach to provide both financial and human asset strategies for the best experience for clients. MAP combines an encouraging process with technical guidance on many issues including: saving and spending, accumulation, debt strategies, education planning, tax strategies, retirement planning, risk management, investment strategies, estate planning, and lifetime gifting.

**How are we different than other financial planning firms?** MAP differs from most advisors because as a fiduciary, we are paid directly by our clients and do not accept commissions or payments from outside sources. Our focus is always on the best possible result for our clients' financial success and well-being by providing guidance and counseling while avoiding conflicts of interest.

**Why would you want to work at MAP?** We are an industry-leading team of financial planners, having attained numerous designations and certifications based on our comprehensive and nurturing approach to financial planning. The MAP team is comprised of a wide range of experience from the Founders through the 2<sup>nd</sup> generation Planning and Operations team, and Residents starting their careers. We are authentic, value loyalty and hard work, and are looking for others who are committed to achieving positive outcomes for our clients and fellow team members.

**Who are we looking for?** MAP is currently searching for a Client Service Specialist (CSS), who has a strong passion for helping others. We are seeking someone who is organized, detail-oriented and analytical with a friendly, caring, and compassionate personality towards people. The right candidate is motivated to help others achieve their best, encourages open communication, takes initiative, and provides leadership to help each other and our clients. We prefer someone who is driven by results and brings enthusiasm to the job each day. All MAP employees work on a variety of tasks and seek opportunities to grow and improve.

### Job Description

The CSS will go through a short training period where they receive an overview of MAP, our history, and planning philosophies. From there, you will receive continued training to be able to independently do the following tasks and other duties as assigned. A successful CSS may advance to train and oversee others in this role.

- Prepare, process, and confirm client paperwork
- Prepare client documents and information for meetings
- Process investment changes in client accounts
- Maintain office and client meeting supplies
- Answer and route incoming phone calls
- Schedule client meetings
- Handle incoming/outgoing mail
- Prepare meeting rooms prior to client meetings and greet them upon arrival
- Track ongoing client communications (newsletter, birthday cards, etc.)



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## Qualifications include:

- 4-year degree (preferred)
- Experience in a consultant support role in a dynamic and growing organization (preferred)
- Strong understanding of Windows-based systems with proficiency in Microsoft Excel, Word and Outlook
- Ability to quickly learn new software systems essential to your role and responsibilities (CRM, Microsoft 365, Morningstar, Adobe Suite, DocuSign, etc.)
- Excellent verbal and written communication skills are essential for interaction with clients and teammates
- Problem-solving, analytical, and critical thinking skills with high attention to technical accuracy
- Highly motivated individual who takes initiative and works independently to manage workload
- Ability to multi-task and manage competing priorities

## **Compensation & Position**

- Compensation relative to experience and education
- Quarterly revenue sharing compensation after one year of employment
- Retirement plan with company contribution
- Required training and continuing education costs are paid by MAP
- Employer-paid Long Term Disability coverage
- Paid Time Off, Sick Time and Holidays
- Flexible work arrangements (hours and remote) based on job proficiency
- Employer assistance with health insurance

To apply, please send a cover letter and resume in PDF format to: [careers@mindfulplanning.com](mailto:careers@mindfulplanning.com)