

Kearney Financial Services, LLC is an independent financial services company affiliated with a national broker dealer providing financial advisory services to individuals and small corporations in the southeastern Michigan communities.

The position outlined below is an immediate opening to assist the financial advisor in serving the needs of clients and prospects being serviced out of this office.

The office is located in Trenton, MI.

Service Associate

Typical duties, responsibilities, skills and specifications of a Service Associate role:

DUTIES AND RESPONSIBILITIES

- Interacts daily on the phone and in person with prospective and existing clients in order to handle basic inquiries.
- Processes and follows up on client documentation for proper maintenance of accounts.
- Prepares letters, forms, and spreadsheets to assist with servicing existing clients and prospecting for new clients.
- Assists Financial Advisors with marketing efforts.
- Receives and processes securities. Receives cross-training and assists with other operational functions as required.

SKILLS AND SPECIFICATIONS

- Ability to analyze and research client account information.
- Operation of standard office equipment and required software applications to produce correspondence, reports, electronic communication, spreadsheets, and databases.
- Uses appropriate interpersonal styles to communicate effectively, both orally and in writing, with all organizational levels. Provides a high level of customer service.

Certain background check requirements are necessary to meet the needs of the broker dealer to be hired.

Desired hours M-F 9am-230pm.

Compensation for this position is commensurate with skill set.

Interested parties should email Lawrence.kearney@raymondjames.com to receive an application to be completed and returned prior to an interview being scheduled.