

Client Service Professional

Ancora is seeking a client service professional to join our Retirement Plans team, which works with employer-sponsored retirement plan sponsors, their plan participants and third-party service providers.

Location

This position is located at Ancora's Cleveland, Ohio, office.

Duties and Responsibilities

This role will focus on providing exceptional client service while ensuring efficient day-to-day administrative support for our Retirement Plans division.

- > Answer client and vendor inquiries via phone, email or mail in a timely, accurate and professional manner, following internal processes to maintain accurate records
- > Provide high-quality administrative assistance to the Retirement Plans team through the completion of a broad variety of tasks including but not limited to revenue tracking, document preparation, printing and collating, filing, preparation of correspondence and mailings
- > Learn vendor workflows to accurately process client requests, acting as a client resource and liaison between other internal groups

Qualifications

- > Bachelor's degree or equivalent preferred
- > Client-facing experience in a customer service or operations role required
- > Financial services industry experience (and general understanding of qualified plans) preferred
- > Strong PC skills including Excel (working knowledge of Microsoft Dynamics CRM preferred)
- > Office administration experience (phone system, copy/fax machine, postage machine, presentation binding) preferred
- > High ethical standards and ability to maintain confidentiality
- > Keen attention to detail and accuracy with a strong work ethic
- > Team-oriented with effective interpersonal skills including ability to communicate professionally over the phone and in person
- > Professional appearance and demeanor

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

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About Ancora

Ancora is client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management and retirement plan advisory services to individuals and institutions.

Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

Visit www.ancora.net for more information.

Apply

Apply online at www.ancora.net/careers or email careers@ancora.net.

