

Operations & Client Service Professional

Ancora is seeking a client service professional to join our operations team. This position supports Ancora's advisors and clients through various operational processes such as opening custodial accounts and maintaining client relationships by providing excellent service.

Location

This position is located at Ancora's Cleveland (Mayfield Heights), Ohio, office.

Duties & Responsibilities

This role will focus on providing exceptional client service while ensuring efficient day-to-day operational support.

- › Communicate with clients and vendors via phone, email or in-person in a timely, accurate and professional manner, following internal processes to maintain accurate records
- › Follow internal and custodian workflows to accurately prepare and process account openings and client money movement requests, such as assisting with daily remote check deposits, ensuring optimal client service
- › Act as a liaison between sales, billing and other internal groups, serving as a resource to efficiently resolve client inquiries
- › Schedule and set up for meetings, provide additional support and assist other operations team members as needed
- › Continually seek to improve financial service industry knowledge through professional development and educational opportunities

Qualifications

- › Bachelor's degree in Business, Finance or related field
- › Minimum of 3-years of client-facing experience in customer service or operations role
- › Financial services industry experience and general understanding of retirement plans preferred
- › Experience working with custodians such as Charles Schwab and Fidelity preferred
- › High ethical standards and ability to maintain confidentiality while following organizational policies and procedures
- › Working knowledge of Microsoft Office applications (experience with Microsoft Dynamics CRM preferred)
- › Professional office experience (phone system, copy/fax machine, postage machine, presentation binding)
- › Team-oriented with effective interpersonal communication skills and a desire to learn and help others
- › High degree of organization skills, accuracy and attention to detail
- › Ability to multi-task with a strong work ethic
- › Professional appearance and demeanor

Benefits

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

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, insurance 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.

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