

Client Relationship Administrator
Wheeler Frost Associates

Reporting to the CEO, the Client Relationship Administrator's primary responsibility is to assist the CEO in the areas of business development and client service.

Responsibilities:

Business Development

- * Assist CEO in meetings with clients
- * Gather, organize and analyze client information
- * Research and prepare presentation packages/proposals for prospects
- * Assist in general marketing activities
- * Work with outside advisors and other referral sources to facilitate the referral process
- * Enhance the effectiveness of the Business Development process through evaluation of the existing system and recommendations for revisions
- * Assist in development of group presentations

Client Service

- * Assist the CEO in managing the client relationship
- * Respond to client inquiries
- * Resolve client problems
- * Gather, organize, analyze and deliver information to clients and their other advisors
- * Research special issues
- * Work with the other staff for delivery of exceptional client service

Qualifications

- * Bachelor's Degree (Finance emphasis preferred)
- * Knowledge of finance and economics
- * Proficiency in Excel, Word, PowerPoint, ACT
- * Excellent communication skills, both verbal and written
- * Knowledge and experience in organizational effectiveness
- * Excellent interpersonal skills and a collaborative work style
- * Strong research skills
- * Project management skills
- * Attention to detail
- * Successful completion of Series 65 exam (post graduation)

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