Client Investment Associate (Account Manager) - Job Description

Advanta IRA- Office in Largo, FL

COMPANY BACKGROUND

Advanta IRA is a leading self-directed account administrator with over $2 billion in client assets under management. We act as a third-party administrator and recordkeeper for individuals who self-direct their retirement accounts by investing in alternative assets such as real estate, start-ups, and private placements. Advanta IRA delivers unparalleled one-on-one customer service, industry expertise, and educational tools that help ensure our clients' success.

POSITION BACKGROUND

Advanta IRA's objective is to continue to grow through the addition of new clients while maintaining low attrition of existing clients. This can be achieved through solid customer service, attention to detail, and following procedures. The person filling this position will learn about IRAs, specifically self-directed IRAs, to support and answer clients' questions. Advanta IRA provides in-depth training to help ensure successful onboarding.

The Client Investment Associate is the main point of contact for their clients. They build relationships with their clients and provide exceptional customer service while guiding them through the processes involved in self-directing their IRAs. They also work closely with the account services team, other client investment associate, and their assigned clients daily. Additionally, Client Investment Associate performs various administrative duties for their clients' accounts and are supported by other Advanta IRA team members. A successful Client Investment Associate is self-driven, organized, and excels at multitasking.

JOB DUTIES

- Process purchase and sale investment transactions related to investments in real estate, notes & mortgages, private placements & private stock, checkbook control LLC, precious metals, foreign currency exchange & futures trading, and cryptocurrency.

- Serve as the main point of contact for Advanta IRA's clients and assist them with the following:
    - Questions regarding self-directed IRAs
    - Types of IRA accounts, qualified plans, and their differences
    - IRS rules, regulations, forms, and filings
    - Advanta IRA's policies and procedures
    - Contributions, transfers, and rollovers
    - Required documentation for transactions

JOB EXPECTATIONS

- Learn, understand, and explain the services Advanta IRA offers our clients.
- Understand the various types of transactions a client may want to conduct and the necessary documents Advanta IRA must receive to process those transactions.
- Handle various kinds of investment transactions.
- Input client and transaction data into CRM System and Trust Account software.

- Assist clients with the paperwork and process for opening an account, transfers, rollovers, ROTH conversions, and investment transactions.
- Perform duties with considerable supervisory guidance.

SKILLS, BACKGROUND & TALENTS REQUIRED

- College degree with a business foundation (Business Administration, Finance, Accounting, etc.).
- Possess strong comprehension skills and the ability to work with or without direction and multitask while paying very close attention to details.
- Be exceptionally well organized, analytical, and detail oriented.
- Excel at accomplishing tasks and following up with necessary parties (clients and team members).
- Utilize excellent verbal, written, and interpersonal communication skills.
- Show proficiency in MS Word, Excel, and Outlook.
- Embrace and exhibit our core values—professionalism, integrity, proactivity, and eagerness.
- Retirement plan and/or financial services experience is a plus.

LOCATION

- Largo, FL

COMPENSATION

- Full-time salaried position
- Health, dental, and vision insurance
- 401(k) plus company match
- Paid time off

PERKS

- We offer many perks like free chair massages, company lunches, a family atmosphere, fun team-building events, activities, and more.