

## **Client Service Manager (Account Manager I) - Job Description**

**LOCATION:** Advanta IRA- Office in Largo, FL 33773

### **POSITION BACKGROUND**

As a Client Service Manager, you are your clients' main point of contact, and you will guide them through their self-directed investing process. In addition to building relationships with your clients, you will work closely with the business development and account services teams. Extensive training is offered to new hires before they are working independently.

### **JOB DUTIES**

As a Client Service Manager, you will perform various administrative duties for your client's accounts, including:

- Processing 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.
- Serving as the main point of contact for Advanta IRA's clients and assisting 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.

**\*\*This position does NOT require licensing\*\***

**\*\*No Sales or marketing required\*\***

### **JOB EXPECTATIONS**

- Learn and thoroughly understand the services Advanta IRA offers our clients.
- Understand and handle the various types of transactions a client may want to conduct and the necessary documents Advanta IRA must receive to process those 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.
- Manage a high volume of calls and emails in a timely manner.

Advanta IRA provides thorough training and supervisory guidance to ensure successful onboarding.

### **SKILLS, BACKGROUND & TALENTS REQUIRED**

- College degree with a business foundation (Business Administration, Finance, Accounting, etc.) is preferred.
- Possess strong comprehension skills and the ability to work with or without direction and multitask while paying 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.

### **Employee Benefits Summary**

- Compensation
  - Salaried position (anticipated: \$50- \$53k, starting)
  - Annual reviews of performance and salary
  - Advancement Opportunities
- Multiple insurance options
  - Medical, dental, and vision
  - Telehealth
  - Prescription coverage
  - Options for Health Savings Accounts (HSA)
  - Individual and family plans available
- Hybrid work schedule options for those who qualify
- 401(k) after 6 months of employment
  - Up to a 4% company match
- Paid time off
  - No waiting period to begin accruing.
  - 9+ Federal Holiday in addition to PTO
- Additional perks include free chair massages weekly, company lunches, and fun team-building events on and off-site!

### **COMPANY BACKGROUND**

Since 2003, Advanta IRA has served clients nationwide to become a leading self-directed account administrator. Today, Advanta IRA manages nearly \$3 billion in client assets with the expectation of continuing to grow. 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, precious metals, and cryptocurrency. Advanta IRA delivers unparalleled one-on-one customer service, industry expertise, and educational tools that help ensure our clients' success.