

Example of Registered Sales Assistant Job Description

Powered by www.VelvetJobs.com

Our growing company is looking to fill the role of registered sales assistant. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for registered sales assistant

- Type correspondence, reports, account information, pair off letters, etc from drafts, transcriptions, memos and various forms
- Provides daily administrative support for assigned Financial Consultants
- Working alongside an experienced and results-oriented team of Financial Advisors and other Sales Assistants, you will provide best in class service to our retirement account clients, as you partner with and support a small group of Financial Advisors in a collaborative environment
- You will ensure that accounts are being opened and funded properly and in a timely manner
- You will use your previous experience or you newly gained knowledge and observations to make recommendations for streamlining and improving processes and efficiencies to better support the needs of our clients
- You will work in an environment that offers continuous personal and professional development to hone your skills as a consummate fiduciary
- Gain proficiency in a variety of technology based systems like AWD, Morningstar, NetX360, Salesforce and others, and utilize these tools to research and extract the information necessary to educate and assist our clients and resolve account issues and inquiries
- Recognize opportunities to engage the client with their advisor in order to ensure that they understand and are making sound financial decisions
- Learn how to ask probing questions and become an effective listener in order

- A Comprehensive Wealth + Health package. It's our passion to empower people, and especially our employees, to add years to their lives and more life to their years

Qualifications for registered sales assistant

- Experience utilizing a Contact Management System such as Salesforce or Red Tail preferred
- Bachelor's degree in a business field or equivalent work experience
- Wealth Benefits
- Operate computer terminals to assist Financial Consultants and/or customers and provide information as appropriate
- Maintain miscellaneous records for Financial Consultants such as appointment schedules, commission accounts, trades executed
- Schedule business trips for Financial Consultants, coordinate with customers while Financial Consultants is out of office, and assist with filing expense reports for Financial Consultants