THOMPSON
— FINANCIAL GROUP —
Estate Planning | Insurance | Investments | Payroll

**Job Title:** Customer Services Representative

**Overview:**
As a Customer Service Representative, you will play a crucial role in ensuring the satisfaction and success of our clients. Your primary responsibility will be to proactively manage and nurture client relationships, ensuring that their needs are met and that they derive maximum value from our services. You will serve as a liaison between clients and our Financial Advisory (FA) team, facilitating communication and addressing any concerns or issues that may arise.

**Essential Functions:**

1. Client Relationship Management:
    a. Build and maintain strong, long-lasting relationships with TFG clients.
    b. Act as the main point of contact for clients, serving as main liaison between the FA and the client(s).
    c. Guide clients through the servicing process, ensuring a smooth and efficient experience.
2. Office Operations
    a. Receive and review client service requests, ensuring all necessary information is obtained and documented accurately.
    b. Manage and maintain office records, including client files and correspondence.
    c. Assist FA team with documents and meeting preparation.
    d. Process all application steps to effectively and efficiently open new investment accounts for clients, keeping the client informed through the process. This will include both electronic and physical account opening paperwork.
    e. Ensure client signatures are completed in a timely manner, whether electronic or physical.
3. Monitoring and Analysis:
    a. Monitor the client servicing process regularly to identify any issues or opportunities for improvement.
    b. Ensure any roadblocks are addressed and/or elevated appropriately.
    c. Analyze client data and feedback to identify trends and areas for enhancement.
4. Communication and Coordination:
    a. Collaborate with internal teams, including FA, to address client needs and concerns.
    b. Collaborate with external contacts such as Platinum Team members, or external Investment companies.
    c. Communicate updates, including proper forms and procedural steps, to ensure an efficient account servicing process.
5. Issue Resolution:

   a. Address and resolve client issues promptly, coordinating with relevant teams to ensure timely resolution.
   b. Escalate complex issues to the appropriate channels and track them until resolution.
6. Client Satisfaction and Retention:
   a. Proactively work to ensure high levels of customer satisfaction and retention.
   b. Identify opportunities to ensure client base is being fully supported.
   c. Ensure the integrity and confidentiality of client and company information.
7. Documentation:
   a. Maintain accurate and up-to-date client records utilizing the CRM & Monday.com, including interactions, issues, and resolutions.

## Knowledge and Skills:

- Proven experience in client success, account management, or a related customer-facing role.
- Strong communication and interpersonal skills.
- Excellent problem-solving and analytical abilities.
- Detail-oriented with strong organizational skills.
- Ability to work collaboratively in a fast-paced environment.
- Familiarity with CRM software and other relevant tools is a plus.
- Join our team and be a key player in ensuring the success and satisfaction of our valued clients!