



Position: Financial Service Specialist for Kalejta Financial Services – Full Time

Location: Sanatoga, PA

Qualifications:

- 1-3 years professional experience in financial services or related field
- Strong verbal and written communication skills
- High attention to detail
- Computer skills (Microsoft Office and CRM Systems)
- Problem solving skills
- Ability to prioritize & multi task
- FINRA Series 6 or 7 and 66 licensed required

Responsibilities include but are not limited to:

- New business processing
- Pending business follow up
- Updating client information and tasks in CRM database
- Check processing for deposit
- Assisting clients with questions about completing forms and online access
- Sending summary of appointment notes to clients
- Preparing reports for client meetings with financial advisors
- Develop and maintain a knowledgebase of products and services
- Maintain communication with broker-dealer and custodians
- Support financial advisors and clients on EMoney Platform (Wealth & Dream Tracker)
- Responsible for firm compliance with broker-dealer

Office hours are Monday – Friday, 9 AM to 5 PM (with an occasional evening or Saturday for client events or appointments). Offices in Collegeville & Sanatoga, PA

Please email your resume' and cover letter to kalejtafinmgmt@kalejta.com