

**Position: Financial Service Specialist for Kalejta Financial Services – Full or Part 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 preferred

**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](mailto:kalejtafinmgmt@kalejta.com)