



## Client Service Coordinator

### Overview:

As a Client Service Coordinator at The Bulfinch Group, your work is impactful. You're making a living by supporting advisors, building your own financial planning practice, helping families, businesses and individuals gain financial security, clarity and confidence.

At The Bulfinch Group, you are part of a Team who values respect, passion, integrity and collaboration. We enhance existing relationships, discover and build new ones; and help everyone we meet live their best life.

### About The Bulfinch Group:

The mission of The Bulfinch Group is to serve our clients with respect, passion and integrity. We encourage a collaborative environment that strives to enhance existing relationships; discover and build new ones; and to help everyone we meet to live their best life possible. We deliver nothing short of excellence.

Our philosophy – be professional, give back and have fun – is the cornerstone of The Bulfinch Experience. Our commitment to our community is strong and is a vital part of our culture. We promise to be the “Best at Getting Better.”

***We Make a Difference.***

### Job Description:

- Entrepreneurial desire to start own business
  - Personal production in year 1 = 25%, year 2 = 35%, year 3 = 50%
- Interact with clients to answer their questions, gather necessary information and support The Living Balance Sheet (LBS)<sup>®</sup> (30%)
- Prepare packets and paperwork for client meetings; maintain & organize client files: documenting files, ensuring that files are current (30%)
- Help to manage the client engagement cycle, ensuring that cases are moving forward
- Take notes during client meetings, provide thoughts / insight for Case Design and Analysis

### Qualifications:

- Entrepreneurial desire to build your own book of business, while in a client service role
- Self-motivated with a dynamic personality, resiliency and passion for succeeding
- Strong desire to help others achieve financial success
- Driven to expand current network by cultivating and enhancing long-term relationships
- Passion for client-services
- Strong listening and communication skills
- High attention to detail
- US citizen or permanent resident
- “Tech savvy” and has ability to quantitatively analyze financial data
- Life and Health Insurance licenses, preferred



**Benefits:**

Quality people deserved to be recognized for their performance. In addition to the opportunity to achieve unlimited growth potential in the finance industry, you are eligible to enjoy a substantial compensation package that includes:

- High earning potential with one of the most lucrative contracts in the business
- Comprehensive benefits package including a Defined Benefit Plan, 401(k) with match and Roth options, health and dental insurance, and more
- Extensive training, coaching, mentoring and collaboration
- Opportunities for leadership development and management positions

If you're looking for a career that satisfies your entrepreneurial spirit, this could be a fulfilling career for you.

For more information, please email Leigh at [leighmcloskey@bulfinchgroup.com](mailto:leighmcloskey@bulfinchgroup.com), or visit our website: [www.bulfinchgroup.com](http://www.bulfinchgroup.com).

Job Type: Full-Time