



POSITION OBJECTIVES

Provide support to Andrew Guyton, Owner – Forge Financial, Proteges, team members and client base

RESPONSIBILITIES

- **Client Services**
 - Primary point of contact for needs and requirements involving existing client base.
 - Assist clients in accessing accounts and reporting platforms.
 - Generate new Investment proposals and new account paperwork.
 - Provide life and disability insurance illustrations and other sales support.
 - Process life and disability insurance applications.
 - Resolve client issues, respond to inquiries, and process service needs.
 - Process financial transactions for clients.
 - Prepare for all client meetings (prospects and existing clients) by preparing summary reports, investment reports, Excel documents, new account paperwork and/or existing account service paperwork.
 - Set new clients up in all required databases, including creation and population of The Living Balance Sheet® page.
 - Policy Service Manager – Policy changes, Conversions, In-force Ledgers.
 - Supplement activities of Andrew Guyton to ensure full coverage of client needs.
 - Recognize and convert new business opportunities in current book of business and with prospects.
- **Office Services**
 - Assist in meeting preparation and client follow up.
 - Serve as point of contact for TPAs and Plan sponsors/administrators.
 - Process Illustrations for any and all products being considered during analysis phase.
 - Create various reports and analysis as part of strategy development.
 - Monitor open cases throughout underwriting/account opening process and update internal tracking tools.

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