



## Join our Team!

Join our team of multi-disciplined professionals who help clients preserve, leverage and transfer their wealth. Recently named one of Crain's Cool Places to Work for in Metro Detroit...our core values create an incredible working environment that allows us to really live and deliver on those values.

### OUR CORE VALUES

Clients' Needs First! • Create a complete "WOW" experience for clients and our staff!

A Special Place To Be! • Cutting Edge Knowledge – we strive to be the experts.

[Click here to view the video](#)

## CLIENT SERVICE ADVISOR

### DESCRIPTION

We are seeking a creative, organized, detail-oriented team player to contribute to the growth and profitability of our company by providing and delivering sales support and service that result in a "WOW" experience for our insurance clients. The Client Service Advisor will put our clients' needs first with creative strategies and solutions.

### ESSENTIAL JOB FUNCTIONS

- Communicating and establishing a significant relationship with our clients and their advisors
- Focus on understanding our clients' needs and expectations
- Creating custom solutions to best address their individual goals
- Fields and responds to client inquiries regarding existing life, disability and long term care policies
- Obtains critical details relating to the transaction
- Provides service (advice and forms) for all existing policies, including, but not limited to, premiums, reinstatements, policy changes, values, summaries and death claims
- Annually review policies to ensure they are performing as intended
- Ensure that all service requests are handled efficiently and effectively to create that "WOW" experience
- Maintains the integrity of the client database and electronic files
- Prepares Agent of Record or 3rd Party Authorization letters while maintaining carrier requirements spreadsheet

### EXPERIENCE

- Education: High School Diploma, Associates/Bachelor's Degree a plus
- Experience: 2-4 years customer service experience, life insurance/financial services field a plus

### REQUIRED SKILLS

- Detailed oriented team player
- Motivation and passion towards process improvement
- Strong computer skills, particularly with Microsoft Office
- Eager to learn complex products and legal concepts
- Strong written and verbal communication skills to be able to explain complex concepts to our clients and their financial and legal advisors.
- Enthusiasm – the company's culture is based on meeting the client's needs and exceeding their expectations
- Discretion/confidentiality a MUST in this position

### PREFERRED SKILLS, BUT NOT REQUIRED

- Strong understanding of various types of life insurance plans

Please send your resume to [careers@schechterwealth.com](mailto:careers@schechterwealth.com)