Title Options: Business Development & Client Services Specialist

About Us

Mosaic Retirement Planning, LLC is a comprehensive financial planning and investment advisory firm. MRP offers financial planning, annuities, insurance and investments to the public. Its founder has been providing solutions to retirees and pre-retirees since 2007, and has adopted a financial planning process that is recommended by the CFP Board, which is widely regarded the gold standard for financial planning. MRP strives to be the best in the region at personal retirement planning, for a reasonable cost. MRP's mission is to have a positive impact in the lives of the community, one family at a time.

Faith * Family * Respect * Integrity * Dedication is our Core Values. We look after one another and our clientele like angels, and we work toward being good stewards and want others on our team to have the same passion.

Visit www.mosaicretirementplanning.com for more information.

Position Summary

This position includes business development, customer relations and administrative support to all areas of the business. It requires the ability to manage multiple tasks to meet deadlines and deal with interruptions daily. It involves constant multi-tasking and weighing of situations with full understanding of the impact of decisions. A strong proactive outbound communication skills along with excellent people skills, including prospective and current client interaction and internal team members. Candidates must have excellent time management and be highly organized, flexible, and professional. The ideal candidate for this job is resourceful, a good problem solver and highly organized. Assuring a steady completion of workload in a timely manner is key to success in this position and for the organization.

Duties and Responsibilities include, but not limited to:

Business Development

- Brainstorm, Develop & Implement marketing campaigns & events for the purpose of new client acquisition & client retention.
- Work with marketing partners to organize & operate various evening company events and assist in promoting the services of the firm.
- Conduct warm outbound calls to prospective clients.
- Relationship build with ability to develop business opportunities and provide client support.
- Maintain and maximize utilization of company website and social media platforms for advertising purposes

Client Relations

- Answer calls, greet clients and respond to client requests with professionalism & care.
- Schedule & confirm appointments for advisor(s) with clients, prospects or strategic business relationships.
- Compile materials in preparation for client meetings.
- Maintain accurate CRM for records, tracking opportunities, setting tasks, updating client information, etc.
- Operations & maintenance of facility including ordering office supplies, preparing refreshments for clients, conference room organization and general office organization to ensure a positive client experience.
- Process investment and insurance applications and ongoing client service requests.
- Develop and maintain processes and procedures, as well as maintaining accurate files and records.

Critical Skills Sought

- Confidentiality: maintain all information related to customer accounts in strictest confidence.
- Strong sense of professionalism.
- Sound understanding of disciplined investing and various personal finance topics
- Collaborative personality; work as a teammate in order to further the entire organization.

- Excellent customer service skills, outgoing personality, and a desire to build client relationships.
- Excellent time management skills, with the ability to prioritize assignments, multitask, adapt to changes in daily tasks when necessary and the ability to work under pressure.
- Good oral/written communication, organizational and problem solving ability.
- Experience working independently, capable of solving problems with little direction.
- Patient, flexible, and capable of being able to receive constructive feedback in order to grow professionally.

Preferred Qualifications

- High school diploma or equivalent, plus 1 year administrative or reception experience required.
- 5 years customer service or 3 years Sales or Business Development experience strongly preferred.
- 2 years experience in financial services, annuity or life products strongly preferred.
- Bachelors degree in Finance or Marketing a plus.
- Must be skilled in Microsoft office including Outlook, Word, Excel, PowerPoint, Teams & Explorer.
- Marketing and/or creative design experience using Adobe a plus.
- Willingness to obtain additional licenses, such as series Colorado life insurance license & Series 65/66 within 90 days of employment.
- Strong knowledge of information technology & corporate communication a plus
- Must be able to pass a drug screen.

Why Work at MRP

- We do not discriminate based on health care/vaccination status
- Work hour flexibility
- Part-time or full time position available
- Long term work from home potential.
- $$$$$-The ability to be a key part in growing a business. Strong bonus plan.
- Opportunity for advancement.
- Business casual/professional dress.
- Cohesive small team, ability to influence strategic direction
- Great place to make a big impact on many lives.

How to Apply

Send resume and cover letter to info@mosaicretirement.com. Cover letter should include the following:

- Please tell us why you are interested in this position. What skills make you a good candidate?
- Are you comfortable with this position being part time with the probability of growth to full time? Why?
- This position with a small business based in Centennial, CO. Your presence will be needed in the office most days. Please explain your interest in this location, industry and company size.
- Please explain your experience and interest in performing both the business development in addition to the client service duties.

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This description covers the major purpose and major functions of the job. It is not intended to give all details or a step by step account of the way each task is to be performed. Employees may receive other job related instructions and be required to perform other job related duties requested.

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