

We are looking to hire a full-time **Processing Manager** for our financial practice. An ideal candidate must be extremely detail oriented, efficient in completing tasks and managing deadlines, and can organize several projects simultaneously. The position will have a balance of autonomy and structure. The candidate must take ownership of this role and be an integral part of our growth. There will be several advisors providing direction for this position.

Compensation will be a combination of base and bonus correlated to efficiency and growth. The bonus structure would allow the candidate to earn equal to or greater than the base pay.

Day-to-day operations include:

1. Input and manage insurance applications
  - Order parameds
  - Help business through underwriting
  - Order APS (when necessary)
  - Create delivery binders/print policies
2. Input and manage investment applications
  - Input application
  - Monitor transfer paperwork
  - Monitor new account set-up
3. Input and manage CRM system
  - Create client profiles
  - Track points of contact/ new opportunities
4. Create client binders
  - Outline strategies in document form
  - Package with instructions on how to create online log-ins for insurance, investments or Emoney
5. Client Communication
  - Stay connected with clients throughout insurance and investment process
  - Call to schedule reviews
  - Set-up client appreciation event
  - Send out anniversary, birthday, holiday cards

If you believe you are a right fit for our team, please send your resume to [processingmanagerjobposting@gmail.com](mailto:processingmanagerjobposting@gmail.com) with a subject line of "Processing Manager."