Heritage
RETIREMENT PLAN ADVISORS

Heritage Retirement Plan Advisors is an Oklahoma City based investment advisory firm that specializes in providing fiduciary and investment services to plan sponsors of retirement plans. Heritage provides objective investment advice and consulting services to plan sponsors of all types of qualified and non-qualified retirement plans.

Position: Client Service Manager- Full-time in Oklahoma City

Responsibilities

- Manage new client implementation process
- Build and maintain client relationships aimed at client retention
- Coordinate and direct client activities with other team members and assist as necessary
- Maintain up-to-date familiarity of industry trends that affect the investment market
- Understands the client's organization and procedures
- Works proactively to develop relationships with vendor and client contacts; may take active role in meetings.
- Communicates directly with clients and vendors with collaboration with senior team members.
- Continues relationships with vendor representatives to better understand available products and services in the marketplace and recommend them to clients
- Work with advisors or more senior team members to identify the strategies to meet client needs
- Prepare document and data for annual client compliance audits to be presented by Advisor
- Attend to client requests including product or vendor service or performance challenges
- Maintain client paper files and electronic data files in a timely manner
- Compile quarterly asset values for billing, journals, transfers, invoicing, annuity fees, commission fees, and collection consulting fees
- Coordinate and schedule appointments
- Responsible for the day-to-day administrative duties of the office, including but not limited to: marketing, financial wellness education, and client accounts
- Adhere to ethics and employee code of conduct policies and, as appropriate

Qualifications

- High school diploma required
- Bachelor's Degree preferred or 3 to 5 years industry experience
- Securities licenses, Series 6, 7, 65, and/or 66 are a plus, but not required
- Experience in retirement plans, investments, financial planning, and/or human resources a plus,
- Positive attitude toward client relations to provide exceptional client service
- Strong verbal and written communication skills are essential to effective client relationships
- The ability to manage multiple tasks and maintain the necessary attention to detail
- Highly organized with strong analytical skills and problem-solving skills
- Strong PC proficiency on various products including MS Office Suite, specifically MS Excel, MS PowerPoint, and MS Outlook
- Able to manage time effectively

Interested candidates should send their resume to Brad Knowles at Heritage Retirement Plan Advisors brad@heritagetrust.com