



Customer Experience Concierge Role Description

Job Title: Customer Experience Concierge

Reports To: Executive Director of Operations & Client Experience

Job Purpose:

The Client Experience Concierge position you've been hired for is a significant role within our company. You will perform a varying multitude of client service and provide internal office support. The Client Experience Concierge reports directly to the Executive Director of Operation & Client Experience and will serve not only as a key member of our team, but also the initial point of contact via phone or in person for the clients or professional partners of AEGIS Financial.

Company Culture:

AEGIS Financial is a company whose culture is defined by the character of its team members. As a result, each team member must possess an unyielding desire to exceed client expectations. We serve our clients the way we want to be served. Being entrusted with our clients' livelihood and their life's work means that every activity and interaction requires the highest degree of ethics and professionalism. Our continued success depends on a diverse array of professionals working together towards common goals and each of us promoting a shared culture of excellence and mutual accountability.

AEGIS Financial is also a unique work environment that values teamwork and strategic cooperation among its advisors and its team. Each team member brings a unique skill set and experience to the organization, and we value and respect everyone's unique talents. AEGIS Financial expects all team members to be respectful of each other and strive to make collaboration and cooperation among members of the firm a cornerstone of our culture and success.

Accountability is also a key element of success. AEGIS Financial is committed to a proactive culture so that each of us is accountable for the very best service for our clients within a reasonable timeframe.

Principal Accountabilities:

- Makes the client feel welcome and comfortable in the office; offering favorite drink
- Gathers personal data from the client to maintain our CRM database for purposes of making their experience with AEGIS exceptional
- Provide office support including answer telephones, assist visitors/clients, resolve and/or refer problems or inquiries onto proper personnel
- Manages calendar and schedules meetings for clients, prospects and outside vendors
- Coordinate and perform a range of staff and/or operational support activities
- Prepares and coordinates documents in preparation for meetings



- Transcribe and prepare correspondence, agenda, forms and documents for client meetings
- Is prompt with post-meeting processing and follow up
- Open, transfer and close customer accounts and maintain appropriate account records
- Process all required paperwork to create, maintain and service client's accounts
- Attend client/prospect events and seminars
- Responsible for coordinating daily client/prospect correspondence
- Interacts with Raymond James home office staff to develop cooperative relations and guarantee timely follow through on requests
- Interacts with Professional Partners to develop cooperative relationships to meet client's needs
- Establish, maintain and update files, databases, records and/or other documents
- Documents all relevant action items and tasks being tracked in Redtail CRM
- Executes project-related tasks to contribute to the firm's development
- Operate standard office equipment and use required software applications
- Cultivates ideas to develop or help improve office systems and protocol
- Responsible for running company errands
- Assists with any special projects
- Assists the Director of Marketing with special events, seminars, and our marketing campaigns

Knowledge/Experience/Skills:

- High School Diploma
- 1-2 years Administrative experience desired
- MS Excel, Word, Outlook and PowerPoint proficiency to produce professional documents
- CRM Database experience and task management is helpful
- Ability to improvise and proactively assist in client requests or firm tasks
- High communication skills (written and oral)
- Excellent organizational skills to prioritize and complete work efficiently
- Ability to follow instructions, including a strong adherence to meet deadlines
- Ability to work simultaneously on multiple projects
- Ability to take detailed notes and follow instructions with little guidance

Attributes and Behaviors:

- Professional, service-oriented demeanor with pleasant, business appropriate manners
- Develops and maintains positive working relationships with others
- Arrives to work 10 minutes prior to the office opening to ensure the office is prepared to greet client in person or on the telephone
- Actively shares ideas and information on firm roles, responsibilities and systems
- Completes tasks accurately and timely
- Admits to mistakes immediately and works quickly to resolve the issues



- Maintains a high customer service ethic and is passionate about meeting and assisting clients
- Takes pride in the achievement of team objectives
- Assists team members unprompted
- Keeps pace with changes and acquires knowledge/skills necessary for business development

Working Conditions:

- Tasks closely governed by policies and procedures
- Flexibility in working hours to attend client events or meeting outside normal business hours
- Professional to Business Casual Dress Code
- Occasional travel

Benefits:

At our firm, we understand that our employees work hard, so we offer a benefit program to help you achieve a successful work-life balance. Our continued success depends on a diverse array of professionals working together toward common goals while striving for independence, innovation, intelligence and integrity. It's a rewarding foundation where unique individuals are given the tools to excel through their own hard work and determination. We foster a friendly work environment where all associates are considered family.

Additional benefits for this position include:

- Quarterly bonus plan
- Health & Group Term Life insurance Plan
- 401(k) retirement program with company match
- Paid Time Off
- Paid Holidays
- Continuing Education Reimbursement Plan
- A complete list of benefits can be found in the Employee Handbook

Salary Range: \$12 -\$18/hr depending upon experience

Next Career Path: Client Service Associate 1