

Financial Administrator

Company Overview:

Mercer Advisors is an industry leader in life planning helping healthcare professionals achieve

their life vision and goals by providing comprehensive practice and financial services as support

at every career stage. Our staff of over 160 in 10+ offices coast-to-coast includes financial advisors, Practice consultants, attorneys, CPAs, investment experts, and other skilled and talented professionals who want to create a life of choices and freedom for each and every client.

A company recently recognized by Forbes.com for the strength & size of their investment advisory services, has a great opportunity for a Financial Administrator. The Financial Administrator will work in a client-focused environment assisting Financial Advisors in servicing the needs of the firm's high net worth clients.

To be successful in this role, you must be organized, have outstanding attention to detail, excellent computer proficiency and great communication skills. Financial services experience is preferred.

For more information about Mercer Advisors, visit <http://www.merceradvisors.com>.

About the Opportunity:

- Diligently track all administrative workflow
- Schedule client meetings
- Monitor the investment operations for accuracy and timeliness
- Collect and prepare client information for meetings
- Interact with other departments to support preparation process
- Track implementation of client financial plans
- Follow-up with clients' other advisors as needed (CPAs, attorneys, etc.)
- Provide general office support for department

Requirements:

In order to be considered as a candidate for this position, your resume should demonstrate that you have the following knowledge, skills, and/or abilities:

- One to four (1 to 4) years' experience preferred
- College degree (i.e. Finance, Business Economics, and Accounting), or comparable financial services experience is also preferred.
- Series 65 license a plus; or current engagement toward obtaining this credential
- Excellent verbal, written, analytical, and organizational skills
- Proficiency with MS Word, Excel, PowerPoint and Outlook
- Ability to work with high-level, busy professionals
- Have the ability to enjoy and perform being part of a team structure.
- Must maintain highly professional, flexible, and confidential business decorum, at all times.

Why work for Mercer Advisors?

- Our reputation for excellence.
- We are dedicated to making sure employees have the proper tools and environment to be their best.
- We are the largest dental practice consulting company in the United States.
- We offer competitive compensation and benefits including 401(k), Health, Dental, and Vision Insurance, and Paid Time Off.

Email Submittals to: jobs@merceradvisors.com

Job Reference Code: SSFA

Compensation: \$32,000 - \$42,000/year (depending on experience)