



Processing Specialist

Description:

Hunter Associates is seeking a detail-oriented person to service in the position of processing specialist. Do you enjoy checking off tasks? Does order give you a sense of comfort and security? Then this is the job for you. The processing specialist works within a team of Financial Advisors and Associates, adding administrative and operational support to bring client service tasks and projects to completion. This individual must possess the ability to work closely with both the advisors and support individuals within the team and the greater firm. Ability to process a high level of workflow independently is required.

Responsibilities:

This role is responsible for the completion of client service-related tasks and supporting other members of the team.

General Duties:

Support the electronic and paperwork processing of most client service tasks. Individual must complete various tasks as assigned with a high level of diligence and accuracy. Basic tasks include but are not limited to:

- Process new client account forms
- Add and maintain client data across business systems, including document management and customer relationship software
- Process client service requests and general account maintenance as directed
- Client communication including answering phone calls and greeting clients
- Assist with quarterly portfolio reports
- All project work as assigned
- General clerical functions for the firm (typing, filing, phones, etc.)

Qualifications:

High School Diploma or equivalent experience
Strong computer skills and knowledge of Microsoft Office products
Detail-oriented with superior organizational skills
Team player with the ability to collaborate with others
Able to maintain highest level of confidentiality
Able to work under pressure and balance multiple tasks simultaneously
Financial industry experience a plus

We offer:

Hunter Associates provides competitive compensation and an engaging environment centered on freedom with responsibility. Our culture arises from being a team of high-achieving individuals dedicated to helping our clients define and reach their financial objectives. Hunter Associates is an employee-owned, independent wealth management firm. We offer a comprehensive benefit package including a 401(k) and medical, dental, vision, life and disability insurance.

About the Firm:

Hunter Associates' primary goal is to help our clients define and achieve their financial objectives. Our further goal is to provide our associates with growth opportunities, a rewarding experience and a pleasant environment. Our success, both financial and otherwise, will be a by-product of achieving these goals. Member of FINRA and SIPC. www.hunterassociates.com