A 2021 JOB

OPPORTUNITY

LOOKING FOR A DIFFERENT PROFESSIONAL EXPERIENCE?

THEN WE'RE LOOKING FOR

YOU.

LAX & CO.

FIERCELY INDEPENDENT,
BUT NOT ALONE.

3616 Post Road Warwick, RI 02886 | T: 401.738.7776 | Kristin@laxandco.com

WWW.LAXANDCO.COM

Securities offered through Cadaret Grant & Co., Inc. member FINRA/SIPC. Lax & Co. and Cadaret Grant & Company are separate entities. Securities offered in CA, CT, FL, IL, MA, MD, NH, NJ, NY, RI & WA.

COVID-19 PRECAUTIONS

At Lax & Co., safety is paramount. We are a small office, and our clients communicate with us primarily via phone or email. Any visitors are required to wear a mask, and our safety precautions meet or exceed the state standards.

Our new hire will have their own office, computer, and office phone. This space is solely theirs and will not be used by anyone else.

There is hand sanitizer throughout the building. Our office is professionally cleaned and sanitized by a local agency.

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SOME OF WHAT WE DO.

Financial Planning
Insurance Planning
Retirement Planning
Investments

WHAT MAKES US DIFFERENT.

- Industry Leader for 49 years
- Member of Forbes since 2018
- Only Rhode Island firm to be featured on the cover of Insurances News Net Magazine
- Only firm to qualify to be an owner of Lion Street
- Nationally awarded for client service, talent, and production
  Continued growth and stability

AN IN DEMAND EMPLOYER

Lax & Co. is comprised of a small team of professionals committed to the work they do and the clients they serve.
It's a fast-paced environment with great people and even better clients. We are constantly approached by professionals looking to be the next Lax & Co. team member because of our reputation.
It's time. We're looking for you.

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JOB DESCRIPTION

CLIENT RELATIONS ASSISTANT

Job Type: Full-Time M-F 9a-5p
Work Location: One Location

Responsibilities

- Follow up on security transactions, transfers, periodic plans, and all other transactional paperwork as required.
- Handle and resolve all aspects of client service-related issues whether incoming or outgoing including follow up on transactional issues, booking appointments, and other related tasks as required.
- Work with leadership to complete complex documentation such as estate documentation with Executors/Beneficiaries/Accountants/Lawyers, Stock Certificates, Swaps, Trust & Estate, etc.
- Meet existing and prospective clients' needs.
- Pursue business development opportunities by identifying and acting upon leads through sales and marketing campaigns, telemarketing, networking, community, and business-related endeavors.
- Prepare professional correspondence and reports including meeting preparation documents and input into financial planning software.
- Support a paperless office environment by imaging and storing documents as per processing standards.
- Input and maintain CRM software.
- Schedule client appointments and inform clients of all required documentation
- Organize and prioritize large volumes of information, emails, and calls
- Maintain and organize client records and files in accordance with firm compliance
- Serve in the front desk position as needed and directed
- Provide direct support to executive team
- Actively participate in team meetings.
- Perform reception duties as required.
- Perform related duties as required.

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JOB DESCRIPTION

CLIENT RELATIONS ASSISTANT

Job Type: Full-Time M-F 9a-5p
Work Location: One Location

Required Qualifications

- Required Qualifications:
- Minimum of two years' industry experience.
- Excellent written and verbal communication skills.
- CRM software experience an asset.
- Strong client service skills.
- Strong organizational, multi-tasking and time management skills with the ability to prioritize duties within a fast-paced environment.
- Have a strong attention to detail and excellent organization and problem-solving skills.

Required Abilities

- Proficient with the Windows suite of programs.
- Proficient with CRM software.
- Ability to multitask while providing quality service.
- Ability to work independently.

Skills to Benefit this Position Include

- Client Service Skills
- Time Management Skills
- Interpersonal Skills
- Problem Solving Skills

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GETTING STARTED

Interested? Good. We would love to talk to you.
E-mail your resume to Kristin@laxandco.com.
No phone calls please.

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