SCHECHTER
INVESTMENTS / PRIVATE CAPITAL / INSURANCE

CRAIN'S 2021 COOL PLACES TO WORK

JOIN OUR TEAM!

We are growing and looking for teammates that value a cutting-edge entrepreneurial environment along with a strong team approach to getting the work done. Schechter is a 3rd generation financial advisory firm focused on Investments, Private Capital and Life Insurance for High Net Worth (HNW) clients. We are a curious, knowledgeable team that always strives to deliver the right strategy for the client. We dig deep into the numbers, we vet, and research concepts and we deliver with the highest level of service. **It's who we are.**

OUR CORE VALUES

Clients' needs first

Create a complete "WOW" experience for clients and our staff

Cutting edge knowledge – we strive to be the experts

A special place to be

SENIOR CLIENT SERVICE ADVISOR (REMOTE)

JOB DESCRIPTION

This role is an exceptional position for someone who has insurance experience and a strong desire to assist high net-worth clients and their families with their existing life, disability, and long-term care insurance policies. Schechter is a high-growth firm that maintains a white-glove "Clients' Needs First" attitude for all our clients. We are seeking a creative, organized, detail-oriented team player who has previous experience working in a similar role- to contribute to the growth and profitability of our company by providing and delivering excellent customer service that results in a "WOW" experience.. This individual will be placed in a thriving growth environment and have the opportunity to make an immediate impact within our service team.

ESSENTIAL JOB FUNCTIONS

- Communicating and establishing a significant relationship with our clients and advisors
- Fields and responds to more difficult and complex client insurance inquiries in a timely manner regarding existing life, disability, and long-term care policies
- Obtains critical details relating to insurance policies and delivers those details through means of professional communication
- Provides senior level service (advice and forms) for all existing policies, including, but not limited to, premiums, reinstatements, policy changes, values, beneficiary changes, summaries, and death claims
- Work in tandem with our insurance carrier partners and their service teams to provide the client with timely responses
- Provide ongoing reporting and be able to effectively communicate the results of that report to a client
- Maintain detailed notes in our CRM and be able to stay extremely organized while balancing multiple tasks at once
- Maintains the integrity of the client database and electronic files

SKILLS AND EXPERIENCE

- Bachelor's degree preferred
- Experience: at least 5 years life insurance experience or in a customer service-oriented field
- Detailed oriented team player
- Motivation and passion towards process improvement
- Strong computer skills, particularly with Microsoft Office
- Strong intellectual curiosity to understand complex financial products and legal concepts
- Strong written and verbal communication skills to be able to explain complex concepts to our clients and their financial and legal advisors.
- Enthusiasm – the company's culture is based on meeting the client's needs and exceeding their expectations
- Discretion/confidentiality a MUST in this position

OUR PROMISE TO YOU

- Unique work environment with strong employee culture and values
- Competitive salary with Merit and Team Bonus eligibility
- High quality benefits including Medical, Dental, Vision, Disability, HSA, FSA, 401K, etc.
- Paid time off

Please send your resume to careers@schechterwealth.com