

RECEPTIONIST & CLIENT SERVICE REPRESENTATIVE

Reports to: Director of Client Services – Fairport & Luma Wealth

Location: Cleveland, OH

Benefits: Yes

Status: Full-time

JOB PURPOSE

Fairport & Luma Wealth is looking for a **Receptionist and Client Service Representative**. The Receptionist/CSR will be responsible for providing an exceptional client experience as a member of the Client Service team with the potential for future career growth opportunities. The position includes coordinating all front-desk activities, including distributing correspondence and redirecting phone calls. The Receptionist/CSR should have a pleasant personality and provide an overall welcoming environment.

DUTIES AND RESPONSIBILITIES

- Director of First Impressions - Greet clients/prospects/COIs visiting office (Reception/Front Desk Coverage)
- Scanning and downloading of statements
- Mail and FedEx
- Client meeting setup and breakdown
- Prospect toolkit preparation
- Client, Prospect, and COI communication
- Client and COI gifts
- Lead entry into Client Relationship Management (CRM) system
- Accounts Payable, check requests, and invoicing
- Vendor relationship management
- Office supply management
- Coordination of internal company meetings
- Contribute positively as part of a team, helping out with various tasks as required

QUALIFICATIONS

- 1-3 years of experience working in a professional environment preferred
- Working knowledge of Microsoft Office
- Detail-oriented
- Strong organizational skills
- Strong work ethic
- Ability to handle multiple priorities with minimal supervision
- Enthusiastic learner
- Strong written and verbal communication skills
- Self-starter with ability to collaborate and work in a team-first environment
- Experience with a Client Relationship Management (CRM) system is a plus
- Experience with third party custodians (Schwab, Fidelity, TD) is a plus