

Licensed Client Solutions Consultant

Trek Wealth Solutions, a division of Sowell Management

Little Rock or Rogers, AR.

Here at Trek Wealth Solutions everything we do centers around our Core Values and our clients:

- We are family. Have each other's back – Put others first – Critique in private.
- Attitude is everything. Don't be a jerk & don't suck. Be enthusiastic, positivity goes both ways.
- Care about what you do. Passion, desire, and drive for excellence – No half-hearted efforts.
- Own your commitments. Do what you say. First time, every time.
- Go above and beyond. Teamwork always wins. Help each other out. When it's not your job or after 5.

Role:

As a Licensed Client Solutions Consultant at Trek Wealth Solutions, you will help add to our strong service culture by:

- Being the first point of contact for Clients and Promoters from a service and support perspective.
- Providing administrative and operational support for Advisors and Clients including account opening, account maintenance, not-in-good-order (NIGO) resolution, cashiering, and funding accounts through the FLEX Connect Service Center.
- Managing client phone calls, scheduling meetings, and providing clients with solutions, troubleshooting complex situations, and resolving service issues and escalations.
- Facilitating marketing, email, and social media campaigns for Advisors.
- Acting as a liaison between Advisors, Clients, and our custodian partners and helping them to navigate internal departments of Sowell Management, such as Data and Technology, Sales, and Trading.
- Educating Advisors and Clients on processes, services, and procedures of FLEX Connect Service Center for Sowell turnkey asset management platform (TAMP) and the custodian platforms.
- Collaborating and problem solving with our Advisors to create positive client experience.
- Ensuring compliance with financial regulations and adheres to company processes, policies, and procedures.

Qualifications:

- 3+ years of experience in client facing roles in insurance, financial services, or wealth management required.
- Exposure to product categories: securities, alternative investments, and insurance experience preferred.
- Fidelity, Schwab, and Promoters (Insurance and/or CPA) experience a plus.
- FINRA Licenses required: SIE/Series 7 and Series 63/65 or 66 and Insurance license preferred.
- Experience in interacting directly with clients required.
- Professional phone etiquette, verbal, written, and interpersonal skills.

- Detail-oriented and able to multi-task, organize and prioritize work with minimal supervision.
- Team player with ability to perform effectively in a fast-paced environment.
- Demonstrated integrity, work ethic, and an obligation to maintain firm and client confidentiality.
- Microsoft Office experience is a plus.
- Client Relationship Management (CRM) - experience along with CRM tools like Salesforce, Redtail or Wealthbox is a plus.

Company Description

<https://www.sowellmanagement.com> and <https://mytrekwealth.com/>