



A Note From Your Manager

I am seeking people with Financial knowledge / background (e.g. Series 6 or 7, Life & Health license, etc.) and who would be a good personality / mindset fit with the Support Team.

Specifically,

- Comfortable working in a small business
- Success based on results, not politics
- Changing/evolving/flexible job duties
- Advancement/compensation based on willingness to seek/accept additional responsibilities and ability to take initiative; not seniority
- Informal communication structure---Not a lot of scheduled meetings, formal status updates, etc.
- Team player---There are 8 other Support Team members; success depends on their ability to collaborate and help each other
- Likes to problem solve -- Some questions Support receives require thinking “outside the box” and creating a unique solution based on the parameters provided by the advisor
- Excited about learning -- The software is constantly evolving
- Good communication skills -- Most of the day is spent answering phone calls and e-mails from advisors. However, the advisor doesn’t always phrase the question “properly”. The ability to “decipher” the question and explain the same concept in more than one way is invaluable. Psychology and/or Communications courses would be useful.
- “Micro-management” is not in my vocabulary -- I explain the goal and allow the Team member to determine (with assistance from me as requested) the best course of action to achieve the goal.
- Open door policy -- I want the team to feel comfortable sharing concerns, questions, comments

A More Formal Job Description . . .

Customer Support - Financial Planning Software

One of the leading financial planning software providers seeks a full-time professional who enjoys helping financial advisors. As a member of the support team, you’d answer, evaluate and prioritize incoming phone, voicemail & email requests for assistance from users, and conduct web-based training sessions. Candidates must have strong customer service and problem solving skills, work well independently and collaboratively and have a desire to be part of a cohesive team. Experience in the financial services industry or a related degree is strongly preferred.

Send resume and salary history/requirements to:

Brenda Tatum

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