

Impel Wealth Management - Registered Client Services Coordinator

Impel Wealth Management is a well-respected wealth management firm located in Cuyahoga Falls, Ohio. Impel offers a work hard/play hard environment, guided by the core values:

- Clients are family
- Compassion while serving
- Giving respect and creating dignity
- Clients come first
- Contagious joy and laughter
- Pursuing excellence and delivering results
- Excelling through teamwork

Impel has an opportunity for a Registered Client Services Coordinator who is knowledgeable and able to contribute to their continued growth while providing exemplary Client Service. The primary responsibilities for this role include:

- Implementing financial planning recommendations
- Inputting trades
- Processing new investment applications and transfers, and
- Check requests

The Client Services Coordinator will interact daily with clients and must always have a professional attitude and appearance. This person should be client service oriented, able to solve problems and be detailed oriented. Finally, this individual must maintain confidentiality and discretion with client and company information.

Qualifications for this position include:

- Bachelor's degree or relevant work experience.
- Series 6 or 7.
- Experience working in the financial services industry.
- Friendly and professional demeanor.
- Exceptional communication skills,
- Proficient in Microsoft Word and Excel and RedTail.

Candidates should submit their resumes to RHurst@HCapConnect.