AFG | ARAZON
FINANCIAL GROUP, LLC
Our goal is to make your life better.

Marketing & Operations Associate Job Description

Arazon Financial Group*,* a growing wealth management firm, is seeking an Operations Associate to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization! If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

Description

The Operations Associate plays a critical role in the back-office functioning of our firm. With responsibility for the day-to-day operational duties of the firm, the Operations Associate helps keep the office running smoothly and ensures that all client paperwork and processing is handled in a timely, accurate and professional manner.

Key Responsibilities

The role's key responsibilities are event management, social media management, client care and administration.

1. Event Management
   - Organizes quarterly client events and seminars.

2. Social Media Management
   - Manages company website, Facebook and LinkedIn accounts
     - Works with web development firm and/or outside technology firm on website design needs.
     - Oversees all media postings to ensure fresh, timely, and compliance-approved content.

3. Client Care & Administration
   - Creates client meeting update books and reviews.
   - Sends update meeting letters.
   - Greets clients and prospective clients in a friendly and sincere manner, making them feel comfortable when they visit the office.
   - Handles incoming telephone calls.
   - Send periodic client correspondence.
   - Develops, mails and analyzes client satisfaction surveys.
   - Delivers concierge services to "AA" and "A" Clients:

    - Coordinates all gifts and cards.
    - Coordinates random acts of kindness
    - Makes monthly and quarterly “stay in touch” calls
- Handles calendars and confirms appointments for the Wealth Advisor(s) and others in the office.
- Manages CRM.
- Processes new accounts.
- Processes account transfers.
- Processes new contributions and redemptions.
- Processes beneficiary changes.
- Coordinates state, SEC, and FINRA licensing.
- Handles miscellaneous operational activities.
- Sorts and distributes the mail.
- Coordinates the assembly and mailing of client paperwork.
- Orders and handles office supplies.
- Coordinates outside vendors.
- Performs miscellaneous admin duties as they arise.
- Develops and maintains written documentation (systems) of all activities.

Knowledge, Skills, & Abilities

Required:

- Excellent attitude and an extraordinary client service orientation
- Detail-oriented
- Excellent organizational and time management skills
- Ability to handle multiple tasks within tight time frames
- Proficiency with Microsoft Office Suite
- Strong analytical and research skills
- Strong verbal, written, presentation and interpersonal communication skills

Desired:

- Interest in and knowledge of financial markets and investment securities
- Previous securities industry experience
- FINRA Series 7, 63, *(and 65 if needed for your Registered Investment Advisor)*
- BA/BS degree

Salary is commensurate with experience.

We offer a great working environment in a beautiful and professional office location. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational, and focused on improving our clients’ lives.
For more information about our company, please visit our website *www.arazonfinancialgroup.com*

If you’re interested in this opportunity, please send your resume and letter of interest to Mark O. Stephan, Managing Partner at Arazon Financial Group LLC., at mark.stephan@lpl.com or deliver in-person to 8000 78th Street West Suite 150 in Edina, MN 55439.

Given the high demand for this position, we are only able to contact the most qualified candidates.