

**Edward Jones –
Financial Advisor, John Kerr
350 E. Main Street
Westfield, IN 46074
314-515-0648**



Position Title

Branch Office Administrator

Job Description

Do you enjoy working on your own while interacting with a variety of clients? Would you like the stability and support of a large organization in a small office setting? Is it important to feel like you are making a difference? Then, the Edward Jones Branch Office Administrator (BOA) may be the perfect position for you.

Each global Edward Jones branch office is run by a Financial Advisor with the support of the Branch Office Administrator and our headquarters locations in St. Louis and Tempe, Arizona.

This position requires that you possess the following skills:

Client Service
Communication
Initiative
Organization
Continuous Learning

Here's a more detailed look at your day . . .

- **Client Service:** Putting client needs first is deeply rooted in our culture and at the core of everything we do. In providing excellent client service you will:

- Prepare for appointments
- Provide market information or quotes to clients
- Respond to client inquiries on administrative questions

- **Office Administration:** Assisting the Financial Advisor in managing the branch office to exceed firm, client and regulatory expectations includes

- Effective communications with the Financial Advisor
- Management of phone calls and walk-in clients

Ordering supplies and processing expenses

- Account Processing: Ensuring client accounts are processed accurately and efficiently is crucial to satisfying clients. Activities include:

- Opening, closing and transferring accounts
- Processing trade and other transactions
- Processing retirement or estate accounts

- Business Development: BOAs must support the Financial Advisor in developing the branch through:

- Mailings for marketing
- Follow up with prospective clients and clients
- Implementing client seminars and promoting credit card services.

- Self Development: BOAs have the opportunity and are expected to take advantage of developmental opportunities. Examples include:

- Learning your role through online state of the art e-learning
- Keeping up with system and regulatory changes
- Attending regional and firm activities.

You will play an important role to the success of your branch office. Your payoff is competitive salary and benefits with opportunities for bonuses and ownership in the firm. You will also work regular hours that balance well with your life outside of work.

Please click on the link below to apply:

http://www.careerbuilder.com/jobseeker/jobs/jobdetails.aspx?APath=2.21.0.0.0&job_id=JQH6D564JV4P7K7RB1S&showNewJDP=yes&IPath=JRKV0A