



**Client Services Manager/Office Manager**  
**Davis Financial Planning**  
**November 2016**

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**About Davis Financial Planning**

Davis Financial Planning is a successful, locally-owned, fee-only financial planning firm based in beautiful downtown Asheville, North Carolina. The firm offers professional, independent, and objective tax and financial planning services without bias from outside compensation such as commissions, referral fees, or third-party incentives. The team at Davis Financial Planning believes that the financial well-being of its clients is what matters most. Its holistic approach works with all areas of clients' financial lives – tax preparation and planning, investment strategies, insurance, estate planning, retirement planning, budgeting, and more. Davis Financial Planning offers a supportive and conscientious team environment and holds a reputation for exceptional client care. To learn more about Davis Financial Planning, please visit [ADavisFinancial.com](http://ADavisFinancial.com). To watch a short film about the firm, click [here](#).

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**The Position**

This executive-level administrative position will support the Senior and Lead advisors in all facets of office management and client services. A key responsibility of this position is to keep a finger on the pulse of all business and client services endeavors to help the firm run smoothly and efficiently, and to act as the “hub” of information for the firm.

The Client Services Manager/Office Manager position will be responsible for client services activities that include but are not limited to: greeting clients, scheduling, meeting reminders, invoicing and payment processing, client agreement preparation, account applications, meeting preparation, scanning/saving documentation, data entry, CRM management, and meeting follow-up such as assigning staff tasks and sending client correspondence regarding portfolios and client “to-dos.”

The position will also be responsible for office administration activities that include but are not limited to: answering phones, maintaining the firm's supply inventory, processes and procedures maintenance and development, scheduling community appointments for team members, 401(k) administration support, processing inbound and outbound mail and faxes, light housekeeping, Quickbooks entry and reconciliation, accounts receivable/payable, and preparing bank deposits.

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**The Ideal Candidate**

Davis Financial Planning is seeking a dedicated team player that can learn the business from the ground up and is enthusiastic about helping people strive for financial independence. The Client Services Manager/Office Manager position calls for a bright, caring, detail-oriented, multi-skilled, hardworking, self-motivated, and personable individual. The ideal candidate will have a friendly and thoughtful demeanor with clients and possess incredible organization skills in the office.

## Qualifications

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- Excellent computer proficiency: Davis Financial Planning utilizes CRM software, Quickbooks, digital document storage, and other software applications. If not proficient at these particular systems, candidates must be able and self-motivated enough to learn quickly.
- Strong verbal and written skills.
- B.A. or B.S. degree from an accredited four-year university preferred - ideally focused in an administration-related field, accounting, or taxation. (No securities license required.)
- Experience with Quickbooks strongly preferred.
- A high level of accuracy.
- The ability to coordinate the schedules of the financial planning team and its clients effectively, confidently, assertively, and thoughtfully.
- Experience managing a professional client-centered office setting is preferred.
- A self-motivated and naturally curious mindset, with a strong willingness to face challenges head on.
- The ability to work autonomously.
- The ability to discern when to ask questions of team members or partner resources.
- A detail-oriented personality and the ability to multi-task efficiently.
- Willingness to take ownership of assigned roles and responsibilities with a steadfast goal of identifying, documenting, and improving processes and procedures related to that role.
- Confidence in learning new technologies and troubleshooting issues when necessary.
- As appropriate, ability to identify, meet and follow through with client requests.
- A conscientious and willing attitude.
- Knowledge of types of investment accounts is preferred.

## Why consider the opportunity?

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- Competitive compensation
- A warm and collaborative office environment
- 401(k) after one year with a 5% match
- 18 days of time off per year plus six holiday days
- Full time hours with flexibility

## To make recommendations or to apply:

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### Katie French

Senior Consultant

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*Davis Financial Planning is an Equal Opportunity Employer/ Drug Free workplace.*

### Click here to apply and submit your CV/resume:

<https://summitsearchsolutions.catsone.com/careers/index.php?m=portal&a=apply&jobOrderID=8412974&portalID=5652>



[Summit Search Solutions, Inc.](#) is a boutique executive search firm, serving corporate, education, and not-for-profit communities nationwide. Based in Asheville, NC, Summit's team of experienced recruiting consultants are in strategic locations across the country including New York, North Carolina, Colorado, and California.

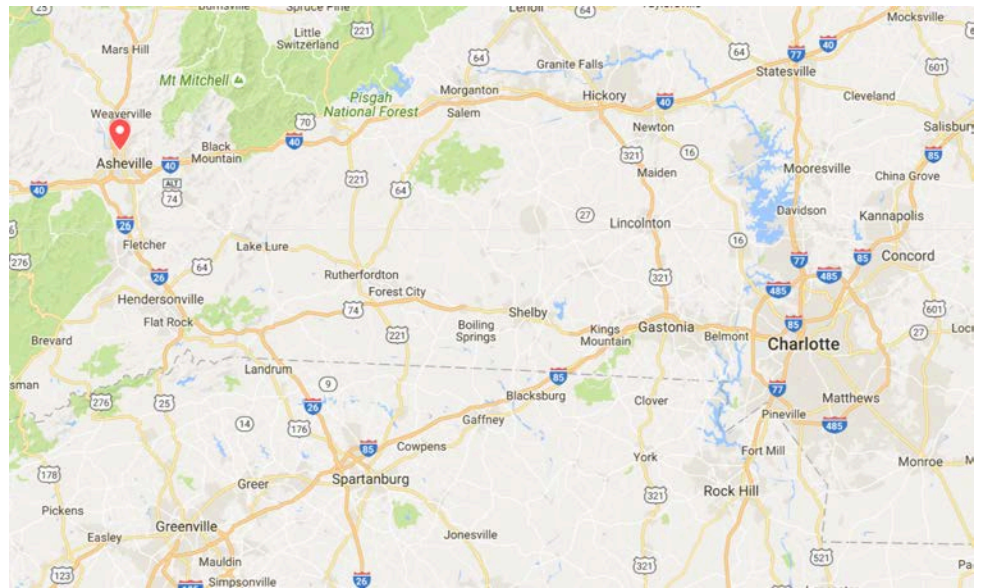


## Asheville, North Carolina

Nestled in the Blue Ridge Mountains, Asheville is the largest city in Western North Carolina. It is known for great hiking, a terrific mild climate, a fantastic culinary scene, and wonderful people. In Asheville you can enjoy clubs, taprooms, coffee houses, food co-ops, eclectic architecture, history, baseball, boutiques, art galleries, independent bookstores, theatre, dance, handicrafts, organic markets, street festivals, music festivals, film festivals, hiking, biking, climbing, rafting, kayaking, canoeing, horseback riding, snowboarding, skiing, ice skating, golf, trout fishing, camping or picnicking. This area is the perfect place to live.

Asheville is located fewer than two hours away from Charlotte, fewer than four hours from Atlanta, and is within a day's drive of 50% of the US population.

The city of Asheville is an artist's community and college town at heart, and ranks as #6 among U.S. cities as a "Best Place to Do Business" by Forbes.com and #7 in "The 2016 Friendliest Cities in the US" by Conde Nast Traveler. Asheville combines small-town charm with an extraordinary urban sensibility.



### *Interesting facts about Asheville and its surrounding areas:*

- The **Pisgah** and **Nantahala National Forests** are right next door to Asheville as well as the famous **Blue Ridge Parkway**, while the historic **Appalachian Trail** is less than an hour away.
- George Vanderbilt created [Biltmore Estate](#) on 8,000-acres in the mountains of Asheville.
- Asheville is ranked as one of "[5 of the Healthiest and Greenest Cities in America](#)" by GreenerIdeal.com.
- Asheville is ranked as one of the "[10 Great Sunny Places to Retire](#)" by AARP.org.

### *For additional information on Asheville, North Carolina, please visit:*

Asheville Chamber of Commerce

[www.ashevillechamber.org](http://www.ashevillechamber.org)

Explore Asheville

[www.exploreasheville.com](http://www.exploreasheville.com)

Asheville Citizen Times Local News

[www.citizen-times.com](http://www.citizen-times.com)