Title: *Valuations Department Coordinator*
Classification: *Full-time exempt; Permanent Hire; Onsite; Hybrid available*
Department: *Valuations*
Reports to: *Director of Valuations*

Who We Are

At FP Transitions, we are the only end-to-end consulting company that helps independent financial advisory firms identify, build, and realize value. The financial services landscape is constantly evolving, and that's why our team must remain laser-focused on what drives firm value across the industry. We believe the future of advice is best served through an independent advice model, and we work tirelessly to deliver intelligent insights that ensure a sustainable future.

We value innovation, collaboration, client-centricity, and objectivity. Seeing beyond the status quo is an essential characteristic that drives our relentless pursuit of accurate and reliable execution. Every day, our team of more than 60 professionals tackle research, one-on-one coaching, legal support, and strategic analysis for dozens of clients. We are entrusted with mission-critical moments and drive life-altering business decisions.

Who You Are

As a **Department Coordinator** at FP Transitions, you will be the key liaison between our valued clients, your department head, and other internal departments. Your primary responsibility will be to shepherd clients through their journey, ensuring a smooth and exceptional experience. You will act as a reliable point of contact, providing vital support, and maintaining clear communication throughout the entire process. You will champion excellence on behalf of the firm, serving as an essential contributor who understands and executes an ideal client journey.

What You Do

Your responsibilities will include, but may not be limited to:

- **Client Point of Contact**: Serve as the primary contact for clients, providing timely and professional assistance to address their inquiries and concerns.

- **Project Management**: Effectively manage client projects, ensuring milestones are met and deliverables are produced with exceptional quality.

- **Scheduling**: Manage and coordinate appointments, meetings, and events, ensuring efficient scheduling for all parties involved.

- **Data Collection**: Assist with the collection and organization of relevant data from clients, ensuring accuracy and completeness.

- **Departmental Coordination**: Collaborate closely with our Consulting and Business Development teams to ensure a seamless transition for clients between departments.

- **Payment Collection**: Facilitate payment collection, ensuring timely and accurate transactions.

- **Timely Communication**: Maintain open and transparent communication with clients, providing updates on their progress and addressing any inquiries or concerns promptly. Report on the status of projects to your department head as requested.

- **Issue Resolution**: Identify and address potential issues or roadblocks that may arise during the client's journey, working proactively to find solutions.

- **Maintain accuracy**: Ensuring records of client interactions, project status, and relevant data are completed, and generating periodic reports as required from the customer relationship management (CRM) software.

- **Client Satisfaction**: Continuously monitor and evaluate client satisfaction per leadership guidelines, seeking feedback to enhance our services and achieve client retention goals.

What You Bring

To thrive in this role, the ideal candidate should possess the following qualifications:

- **Organization**: Demonstrated ability to manage multiple tasks, prioritize responsibilities, and maintain meticulous attention to detail.

- **Communication**: Excellent interpersonal and communication skills, both written and verbal, to build strong relationships with clients and internal teams.

- **Project Management Experience**: Proven experience in project coordination or management, with a track record of successfully delivering projects on time and within scope.

- **Problem-Solving Abilities**: A proactive and solution-oriented mindset, capable of identifying challenges and implementing effective solutions.

- **Client-Centric Approach**: A passion for providing outstanding customer service and ensuring client satisfaction at all stages of their journey.

- **Microsoft Office Suite**: Proficient with Microsoft Word, Excel, PowerPoint, Outlook, and Teams.

- **CRM Experience**: Familiarity with Salesforce CRM and Smartsheet or similar relational database is preferred.

- Experience in the financial services industry is *preferred*, but not required.

Compensation and Benefits

- $22.00-$26.00/hr DOE
- Medical Vision Dental, 401k with 25% employer match.
- Company lunches, snacks, team-building events.
- Company holidays (including employee’s birthday) and accrued PTO.