



Director of First Impressions Job Description / Posting

Skygate Financial Group, a growing wealth management firm, is seeking a Director of First Impressions 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!

Our mission at Skygate Financial Group is to help our clients save and invest for retirement, legacy and other financial goals. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

Description

The Director of First Impressions plays an important role in setting the tone for the organization. As the first and last person clients see when they are in the office, the Director of First Impressions is instrumental in making sure clients have a positive experience.

Responsibilities & Activities

- Greets clients and prospective clients in a friendly and sincere manner, making them feel comfortable when they visit the office.
- Handles incoming telephone calls.
- Sorts and distributes the mail.
- Sends periodic client correspondence.
- Coordinates the assembly and mailing of client paperwork.
- Handles calendars for the Wealth Advisor(s) and others in the office.
- Orders and handles office supplies.
- Coordinates outside vendors.
- Develops and maintains written documentation (systems) of all activities.
- Performs other duties as assigned.

Knowledge, Skills, & Abilities

- Requires:
 - Excellent interpersonal skills.
 - Excellent attitude and an extraordinary client service orientation.
 - Superior phone skills—friendly and helpful in all interactions on the phone.
 - A genuine interest in serving and caring for other people.
 - Excellent organizational and time management skills and ability to multi-task.
 - Professional demeanor.

We offer a great working environment in a 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 client's lives.

For more information about our company, please visit our website www.skygatefinancial.com .

If you're interested in this opportunity, please send your resume and letter of interest to Kevin Theissen at kevin@skygatefinancial.com . Given the high demand for this position, we're only able to contact the most qualified candidates.