



Position: Client Service Specialist

Status: Full-time

Experience: 3+ years

Job Description: The Musuneggi Financial Group, a boutique financial consulting firm, is hiring a Client Service Specialist for our South Hills (Scott Township) office. As the first point of contact for service for our clients and prospects, the Client Service Specialist is an integral member of our team. The ideal candidate for this position enjoys serving clients, meeting new people, solving problems and is a strong communicator. Professionalism—in attitude and appearance—is a priority. This position is for a team player, who is excited about the culture and services of the firm. Salary is commensurate with experience.

Responsibilities for the Client Service Specialist:

New Business Support

Onboard new clients and update existing clients
Maintain and follow systems and processes for the submission and servicing of client financial plans, investments, and insurance
Attend firm-sponsored client events 2-3 times a year

Compliance Support

Maintain New Business Compliance files and logs

Advisor Staff Support

Coordination and maintenance of the client's experience with the firm

Desired Skills & Expertise: The qualified candidate will have:

- High school diploma: 2+year degree preferred.
- Skilled and proficient with MS Teams, Outlook, and Client Relationship Management systems
- 3 – 5 years customer service/professional office experience, including phone experience.
- Impeccable attention to detail and strong organizational skills.
- A clear, courteous communication style.
- Professional appearance and outgoing personality.
- Experience in financial services, accounting, legal or insurance office.

Interested candidates should send cover letter and resume to info@mfgplanners.com.

To learn more about The Musuneggi Financial Group, visit our website's [About page](#).