



SAGE PRIVATE WEALTH GROUP (SAGE) is hiring bright, driven, and talented professionals. Are you keen on pursuing excellence in your field and personal fulfillment in your life? We are looking for individuals who want to be part of a culture guided by the ethos “doing well while doing good.” We are driven by our **CORE** values: **Honesty, Integrity, Accountability, and Pursuit of Excellence.** Does this sound like a role for you or someone you may know? Find out more about us on our website at www.SAGEprivatewealth.com.

Position Summary

The **Client Service Coordinator** will perform a broad range of administrative support activities as well as operational support to multiple Wealth Advisors (WA). This individual will work independently within a team structure while also supporting the leadership team and the WA team to deliver excellent client service. He/She will utilize business best practices while adhering to SAGE standards to ensure efficient execution of day-to-day job responsibilities. The successful candidate will demonstrate daily a commitment to carrying out the mission and values of SAGE Private Wealth Group, an important component of being part of the SAGE team.

Key Accountabilities

- Provide dedicated administrative and operational support to Wealth Advisors
- Schedule and coordinate client meetings, events, and appointments
- Ensure SAGE clients’ needs are met in a timely and professional manner
- Provide administrative support to the leadership team as needed such as scheduling meetings/calls
- Information gathering, analysis and reporting as needed by the leadership team
- Organize and maintain a variety of files, records and databases
- Create professional quality client-facing and firm-ready PowerPoint presentations
- Operate standard office equipment, using required software applications and staying up-to-date with modern office management methods and techniques
- Adhere to all SAGE operational efficiencies and enhancing them as needed
- Contribute to firm building initiatives as assigned
- Provide backup general office support including, but not limited to answering telephones, welcoming and assisting SAGE clients and vendors, processing daily incoming and outgoing mail
- Responsible for general office maintenance and keeping a clean and well organized work environment and office kitchen area
- Perform other duties and responsibilities as needed and assigned

Essential Education

Associates Degree from an accredited institution is required or combination of an equivalent education and experience.

Essential Experience and Job Requirements

- Minimum of 4 years administrative experience required
- Experience in professional services, brokerage or wealth management industries
- High proficiency in Microsoft Excel, PowerPoint, and Word
- Proven ability to handle confidential information with discretion and demonstrate the highest level of client service, ethics, and integrity
- Experience working on multiple projects simultaneously while adhering to deadlines
- Efficiency and accuracy with a high level of attention to detail



- Strong problem solving skills

Key Competencies:

- Communication
- Problem Solving
- Time Management
- Self-Management
- Client Service Orientation
- Integrity and Trust/Ethics
- Building Effective Team Members

Other requirements (e.g. Travel, Location)

This role will be based out of our new corporate offices in beautiful Oakbrook Terrace, Illinois known for fantastic dining, shopping and an outstanding quality of life.

Total Rewards Package

SAGE is committed to providing a comprehensive and competitive Total Rewards Package including Health, Dental, Vision and Life insurance benefits, Long Term Disability insurance, free 24 hour access to health club in our corporate office, a competitive salary, a variable bonus opportunity, and a great career path to partnership. We offer a variety of additional programs and services to help meet the diverse needs of our valuable team members, some of which include unlimited time off, flexible work arrangements, 401k, Wellness Program, and Employee Assistance Program. We also offer tuition assistance, training, peer coaching and mentorship support, on-going “lunch and learn” programs tailored to our team members’ needs and interests.