

## Financial Services Assistant

**REPORTS TO:** Gisela Feliciano-Lopez & Fernando Lopez – Financial Advisors

**DATE:** February 2018

### **EXPECTED RESULT:**

To effectively manage and provide service to the day-to-day operations and support needs of the Financial Advisors. Support Customer needs including service, case requirements and client follow-ups. Responsible for the Team administrative support in all areas. Support and assist in the growth of the Team division.

### **ESSENTIAL TASKS**

- Assist Financial Advisors at all times
- Perform all general office functions including typing, faxing, communicating and documenting.
- Maintain Financial Advisors Calendar and Agenda
- Handle telephone calls and messages
- Create Proposals, Illustrations, in force ledgers and support all New Business requirements for Investments and Insurance Business.
- Maintain up-to-date on product information and application processing requirements
- Timely follow-up on all outstanding application requirements, and underwriting questions that arise. Requires active communication with office personnel regularly regarding items needed on each customer case.
- Marketing: Mailings, News Letters, e-post cards, half a paycheck, local brokerage news among other marketing initiatives

**KNOWLEDGE AND SKILLS**

- Superior customer service orientation.
- Excellent oral and communications skills. Bilingual- speak, read and write efficiently Spanish and English.
- Proficient in software applications like Word, Excel, Power Point and Outlook.
- Self – starter
- Able to work under pressure and independently.
- Strong organizational skills, multi tasking and time management.
- Troubleshooting problems and finding promptly solutions.

**ABILITIES**

- Active Listening- Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Reading Comprehension -Understanding written sentences and paragraphs in work related documents.
- The ability to set priorities and sense the urgency.
- Ability to build relationships
- Must be a team player, willing to assist in all aspects.
- Service orientation: Actively looking for ways to help people.
- Perform other duties as required.

**PHYSICAL DEMANDS:**

- Fixed schedule.
- Attending meetings and seminars.
- Work with supervision.

The above statement is intended to describe the nature and general level of the work performed by the people assigned to this job. This is not an exhaustive list of all the right and responsibilities associated with it. MassMutual Puerto Rico reserves the right to modify and change the responsibilities as needed to melt the needs ot the organization.

My signature certifies that I have received this job description, have received a copy and/or had the opportunity to add new responsibilities to it.

\_\_\_\_\_  
Employee signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor signature

\_\_\_\_\_  
Date