

JOB DESCRIPTION

Job Title: New Business & Operations Coordinator Job

Summary: Our rep-advisors help clients manage long-term financial goals. As a New Business & Operations Coordinator in an OSJ branch office, you will work under the direction of our rep-advisors and staff to support the daily functions and activities in the office. Accuracy and attention to detail are a must for this position. Essential Duties and Responsibilities (May consist of one or more of the following):

- Obtain working industry knowledge of key industry topics, including achieving appropriate FINRA licensing and experience necessary to work directly with clients.
- Assist management in all capacities relating to the operation of the practice and maintain overall client engagement.
- Provide office support as necessary including problem-solving requests for assistance from the firm's existing clients, new or prospective clients, registered representatives, new representatives, staff and other entities.
- Determine, prepare, and process the necessary paperwork for existing, new, and prospective clients' appointments as requested by the rep-advisors.
- Follow-up by phone and/or database software systems with product companies to ensure receipt of pending business transactions.
- Perform various clerical functions including but not limited to answering telephone, filing, faxing, copying, mailing documents, etc.
- Other duties as assigned.

Non-Essential Duties and Responsibilities: Be available at the direction of a supervisor or manager to cross-train or assist in other areas as necessary.

Qualifications: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education/Experience: Entry-Level position, but experience in the Securities Industry is preferred.

Certificates and Licenses: Securities and Insurance licenses preferred.

Supervisory Responsibilities: This position holds no supervisory responsibilities.

Reasoning Ability: Ability to solve practical problems and interpret a variety of instructions furnished in written, oral, and diagram or schedule form.

Language Ability: Ability to read, analyze, and interpret technical procedures or governmental regulations. Ability to write reports, business correspondence, and procedures manuals. Ability to

effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

Computer Skills: Experience with popular content management systems, database software, email, Internet software, spreadsheets, graphics, and word-processing.

Work Environment: While performing the duties of this job the employee is exposed to a quiet noise level. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands: While performing the duties of this job the employee is regularly required to sit, use hands to finger, handle or feel, and talk and hear. The employee is occasionally required to stand, walk, reach with hands and arms, and stoop, kneel, crouch or crawl. The employee is required to lift up to 25 pounds. The vision requirements include close vision and ability to adjust focus. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Schedule: Full-time position of 40 hours a week, Monday – Friday. Time is between the hours of 8:00AM and 4:00PM.

Contact Information: To apply for this position, please submit an application for employment along with a resume to

Email: contact@premieriowa.com

Mail:

Premier Investments of Iowa, Inc.
3600 1st Avenue NE, Suite 100
Cedar Rapids, IA 52402

(319) 363-3811 or (800) 383-6590

In accordance with FINRA (the “Financial Industry Regulatory Authority”, our self-regulatory organization) requirements, any offer of employment is contingent upon your submission of fingerprints to FINRA and no related record of personal history that FINRA would consider a conflict with your employment in the securities industry. Any offer of employment is contingent on your fingerprints coming back clear of any record our regulator would object to.

Premier Investments of Iowa, Inc. reserves the right to change or modify the employee’s job description whether orally or in writing, at any time during the employment relationship. Additionally, Premier Investments of Iowa, Inc., through its supervisors, may require an employee to perform duties outside their normal description within the sole discretion of the supervisor. Employee must comply with all applicable Premier Investment of Iowa, Inc. policies and procedures.

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