



## Job Posting: **Financial Support**

### *About Radnor Financial Advisors, LLC*

Radnor Financial Advisors, LLC is an independent, fee-only, wealth management firm in the Philadelphia area. For 30 years, Radnor has provided wealth management services to high net worth individuals and corporate executives. Our holistic approach integrates personal financial planning, tax considerations, estate concerns, and investment portfolio management. At Radnor, you can experience the benefits of personal wealth management. Our team of highly-qualified professionals comprehensive financial planning focused on the specific needs and circumstances of our clients – investment planning, estate planning, wealth transfer, retirement goals, tax planning, risk management (property and casualty insurance, life insurance, disability insurance) college planning, budgeting, benefits planning and more. We believe the best financial advice is provided by people who are independent and objective. For that reason, we function as a fee-based advisory firm and take care to maintain exclusive advisor-client relationships. We do not sell investment or insurance products and we do not accept commissions. We consider that we have a duty to always act in good faith, and to place our clients' interests first and foremost.

### *Financial Support*

Radnor Financial Advisors, LLC is looking for a Financial Support individual to assist our advisors in servicing clients.

#### **Financial Support Duties and Responsibilities:**

- Comfortable with direct communication with current and prospective clients.
- Integral part of the client service team. Process and draft correspondence for advisors; maintain and update client database.
- Gather materials in advance of client meetings.
- Responsible for preparing forms and verifying they have been received and processed correctly.
- Responsible for communicating with the analysts and consultants regarding task status.
- Serves as a liaison with other functional areas, external customers and vendors in the resolution of routine administrative and operational problems.
- Correspond with custodians regarding processing, account alerts and other back-office items.
- Analytical Tasks: Become proficient with our internal systems; learn client file organization; assist in preparation of financial reports; and effectively use IT initiatives. General administrative tasks.

#### **Experience/Skills:**

- College Degree (Associates or similar required, Bachelors is a plus).
- 1-3 years of experience in the business/finance industry preferred.
- Ability to work in a fast-paced environment.
- Proficiency with Word, Excel, Access, Outlook, Internet.
- Ability to quickly learn other software used by team.
- Must be organized, meticulous, detail-oriented and able to multitask.
- Must be able to prioritize work; ensure daily deadlines are met; and work independently as needed.
- Excellent written and verbal communication skills.
- Team player, able to work well with all levels of the firm.
- Desire/ability to work successfully in a small company environment.

**Compensation/Benefits:** Compensation commensurate with requirements of the position plus attractive benefits.

To apply for the Financial Support position, you must provide your cover letter, resume, and salary requirements to Ms. Vermillion at [radnor@radnorfinancial.com](mailto:radnor@radnorfinancial.com) for consideration.