



CLIENT RELATIONS COORDINATOR

ROLE DESCRIPTION

Role Title Client Relations Coordinator
Reports To Director of Client Relations

LVZ seeks an intuitive professional that delivers extraordinary experiences through anticipating and supporting clients' needs in all our firm's subsets. This role acts as the face of our brand and plays a vital role in client satisfaction, communication, and retention.

WHAT YOU'LL DO

- Answer and direct incoming calls per client requests, relay messages as needed
- Welcome and assist clients and guests in our downtown Holland office
- Complete direct client and colleague servicing tasks
- Maintain accurate information in our Client Relationship Management (CRM) database
- Process incoming and outgoing mail
- Manage personalized client and colleague communications
- Gather, organize, process, and file client paperwork and information
- Assist with preparing for client meetings
- Ensure the lobby area and conference rooms offer a clean and welcoming environment
- Schedule and coordinate client and team meetings
- Collaborate internally with operations, marketing, and financial planning teams

WHO WE WANT ON OUR TEAM

- Effective communicator, both written and oral
- Self-motivated, dependable, engaging conversationalist, excellent organizational skills, detail-oriented, ability to prioritize and meet deadlines
- Proficiency in Microsoft Office programs, DocuSign, CRM systems and database experience preferred
- Welcoming personality that is respectful for a diverse spectrum of clients and colleagues
- Ability to listen, have empathy, and assess all types of situations
- Operates with the highest level of integrity and confidentiality
- Thrives on going above and beyond to exceed client expectations in their interactions.
- Desires to create and improve processes

LVZ operates on five non-negotiables that define the culture of our team. You are the right culture fit if you...

- Foster a welcoming and respectful environment for team members and clients.
- Create extraordinary client experiences that exceed expectations.
- Operate on a foundation of integrity and clear communication.
- Pioneer new ideas and processes as a result of perpetual learning.
- Give generously of time, talents, and treasure to serve our communities.

ABOUT LVZ

Since our founding in 1960, LVZ has remained constant in our mission to deliver peace of mind for whatever comes next in every subset of our firm. We started as a small firm that sold mutual funds - since then, we have expanded to managing multi-million-dollar portfolios and offering comprehensive financial planning services. Our firm has grown to over \$900 million in assets under management across multiple independent broker-dealers.

Learn more about us at www.lvzinc.com.

Start Date	As soon as available (can be flexible)
Hours	Full Time, Monday – Friday 8 am – 5 pm
Salary	\$45,000 Annually, based on experience
Benefits	Professional Apparel Stipend Paid health insurance, elected dental & vision Paid time off (13 days) Floating holiday 401(k) employer match

To Apply Submit your resume, cover letter, as application for this role to hello@lvzinc.com, subject line: '**Client Relations Coordinator – Applicant Name**'.