



JOB TITLE: Onboarding and Transition Specialist
REPORTS TO: Director of Operations
JOB LOCATION: Lawrence, Kansas. Remote work is an option.
ESTIMATED START DATE: ASAP

SUMMARY

Bowersock Capital Partners is seeking an Onboarding and Transition Specialist based in Lawrence, Kansas who can hit the ground running. We need someone to be a central part of our operations team, in charge of onboarding new clients and providing an exceptional client experience. The person filling this position will have an opportunity to shape an entrepreneurial and rapidly growing new firm.

As the Onboarding and Transition Specialist, you would be responsible for providing a smooth and efficient introduction to our firm. You would own the onboarding process from beginning to end. Your goal would be to ensure that each new client starts out on the right foot feeling comfortable and confident.

CORE RESPONSIBILITIES

- Collaborate internally to develop a tailored onboarding implementation plan for the complex and dynamic needs of our clients.
- Set client expectations by clearly communicating requirements and timeframes. Build client trust and deliver high quality customer service by continuously updating client about progress and next steps.
- Ensure onboarding processes are completed in normal processing times and report areas of inefficiency to Director of Operations.
- Work with internal team members to develop a seamless, post-onboarding customer success plan specifically designed for each individual client.
- Introduce clients to statements, online access, and other FAQs toward the end of the onboarding experience.
- Work with Director of Operations and other team members to identify and act on bottlenecks and address potential areas of improvement.
- Organize, complete, and become proficient with all account opening, transfer, rollover, compliance, and other documentation.
- Take ownership of the client onboarding experience, client satisfaction, risk, and compliance escalation/resolution.

KNOWLEDGE, SKILLS, AND ABILITIES

- You are an efficient self-starter with a positive attitude, passion for helping others, and a desire to learn and grow. You thrive independently but also love to collaborate and support others in a team setting.
- You have experience adapting to a fast-paced, dynamic environment with constantly competing priorities. You have exceptional organizational, prioritization, interpersonal, written, and verbal communication skills.
- You independently manage problems and mobilize internal resources to resolve issues.
- Your project management skills allow you to manage multiple onboarding projects in varying stages.
- You demonstrate creative problem solving, solid judgment, and decision making.
- You have impeccable attention to detail and follow through. You professionally address and correct mistakes.
- You respect confidentiality.

EDUCATION AND EXPERIENCE REQUIRED

- 2+ years client service experience
- 2+ years of financial services experience
- Bachelor's degree required; business or finance-related field preferred.

LICENSES AND REGISTRATIONS

- Series 7 or other financial services license preferred but not required.

SALARY AND BENEFITS

- Bowersock Capital Partners offers a highly competitive salary and benefits package.

TO APPLY

Send cover letter and resume to: Careers@bowersockcapital.com

Mailing address:

Bowersock Capital Partners

611 W. 9th St.

Lawrence, KS 66044

Questions regarding this position should be sent to: Careers@bowersockcapital.com

Review of applications will begin immediately and continue until the position is filled.