



## Branch Office Administrator (BOA)

Part administrative, part client development, part client service: The Branch Office Administrator (BOA) position requires:

- Exceptional client service abilities
- Critical thinking capabilities
- Strong initiative
- Effective written and verbal communication skills
- The aptitude to learn and understand the financial services industry

### **Office administration**

This position is ideal for a well-organized person who enjoys multi-tasking and working with technology and people. Daily office administration duties include overseeing appointment setting and schedules, and processing requests and transactions.

### **Client development**

An effective marketing communications program is only as strong as the person who implements it on a daily basis. At the Financial Advisor's direction, the BOA updates prospect and client data records, assists with prospecting activities and planning seminars, and makes follow-up phone calls to set or confirm appointments. The BOA also helps the Financial Advisor deepen existing client relationships by preparing information for scheduled appointments and scheduling systematic contact activities.

### **Client service**

Ascension Advising Financial Advisors are known for building quality, one-to-one relationships with their clients - and they're able to maintain those relationships with the help of the BOA. When clients have questions, the Financial Advisor will often depend on the BOA to provide a timely response.

At Ascension, a BOA ultimately supports our mission of providing the solutions, services and advice individuals need to work toward their long-term financial goals.

### **Your BOA:**

Dorian Thompson has recently been hired as a BOA supporting a number of FAs and branches in Springfield. Although Dorian has several years' experience as a client service associate at another financial services company, Dorian is new to Ascension. Dorian has been trained on the Ascension system but is still learning many of the details and becoming familiar with the clients and the types of service and support that they need.

Dorian came highly recommended to Ascension and although new, Dorian is generally meeting expectations. Dorian has many competing work and family responsibilities and has needed a flexible schedule from time to time. Dorian does not miss deadlines and delivers on time; not early but on time.

Thus far there has been minimal client feedback about Dorian.