MassMutual
Carolinas

Job Title:	Investment Services Specialist
Department/Group:	Wealth Management
Location:	Charlotte, NC
Position Type:	Full-Time

Job Description

MassMutual Carolinas is looking for a candidate to serve the role of Investment Services Specialist. Headquartered in Charlotte, MassMutual Carolinas has been a Carolina tradition of excellence and industry leader since 1890. With more than 150 financial professionals, we provide customized financial solutions to more than 60,000 clients throughout the Carolinas and the United States.

ROLE AND RESPONSIBILITIES

This position helps the Director of Wealth Management support the function of three different departments:

1. **Service the Financial Advisors of MassMutual Carolinas**
    - Support with Business Procedures and On-Boarding of New Advisors
    - Process New Business Opportunities
    - Meet with Product Vendors to Understand Product Offerings
    - Participate in Advisor Case Design
    - Schedule Advisor Trainings with Product Vendors
    - Analyze Monthly Production/Commission Reports

2. **Retirement Plan Consulting Group of MassMutual Carolinas**
    - Analyze New Business Opportunities
    - Schedule and Prepare for Annual Client Review Meetings
    - Analyze Quarterly Production Reports
    - Communicate with Providers to Understand Product Shelf

3. **Private Clients of MassMutual Carolinas**
    - Schedule and Prepare for Client Review Meetings
    - Participate in Client Meetings

QUALIFICATIONS AND EDUCATION REQUIREMENTS

- Minimum of 3-5 years in the Financial Services Industry
- Series 7, and Series 66 or comparable licenses are required.
- Financial Designations (ex: CFP, AIF, ChFC, CIMA) are a plus.

PREFERRED SKILLS

- Knowledge of Microsoft Office (Word, Excel, Powerpoint, and Outlook)
- Knowledge of eMoney, Morningstar, and EchoWealth is preferred but not required.
- Candidate must be proficient with Technology.