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San Diego, CA 92130

# DIRECTOR OF FIRST IMPRESSIONS

No financial services experience required.

## DO YOU

- Love working with people?
- Have an eye for detail?
- Enjoy working in a creative environment?

If so, this is the perfect job for you!

## SALARY

**\$40,000 - \$50,000**  
**+ BONUS**

+ health, retirement benefits,  
and more!

## THE PERKS

Great people deserve great benefits. As a start, benefits include:

- 401(k)
- Health insurance
- Paid and volunteer time off
- Education reimbursement

Work life balance and flexibility is important to us; we are extremely considerate of your personal life.

Starting pay is **\$40,000 - \$50,000** per year, depending on experience. Annual bonus is available based on firm and individual performance.

After years of rapid growth, our firm is ready to expand our team. We are currently in search of a Director of First Impressions (a.k.a. Rockstar Client Service Manager).

Your primary role will be ensuring that every client who contacts our office feels like they are our only client, and that we will do most anything to make their life easier. You will also support the firm's two lead financial planners, manage all administrative functions, and find solutions to potentially challenging assignments.

This job is best suited to a mature individual looking for a long-term job. Attention to detail, ability to solve problems, and amazing people skills are a must, along with computer skills and a willingness to learn. Most importantly, we are looking for someone with a great attitude, who will enjoy coming to work and serving clients as much as we do.

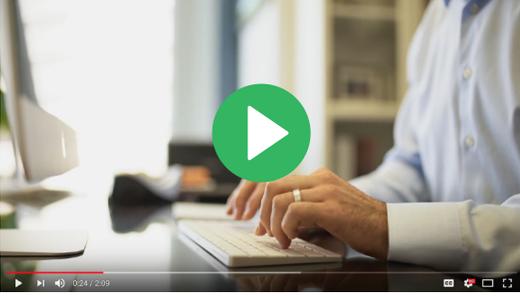
## RESPONSIBILITIES WE'LL TRUST YOU WITH

Your job is to handle everything we don't do, allowing us to remain focused on tasks only we can do (e.g. meeting clients, creating financial plans, investing, etc.). Typical tasks include:

- Onboarding new clients
- Updating and designing processes and workflows
- Creating reports
- Managing phone calls
- Building relationships with our amazing clients
- Processing billing
- Organizing special events - yay for party planning!
- Having fun, and much more!

There is more to this role than just the above. Again, if it's not financial planning or marketing, we will want your help. Even then, we'll likely lean on you for the edges of those tasks too. As a small business, no job can be too big or too small. At Define Financial, our team members wear many hats. Our newest team member will be no exception.

## WHY DEFINE FINANCIAL?



Because you're not a number. We are a growing small business that treats our clients and team members like (or better than) family.

We believe in delivering exceptional client service, treating everyone with respect and doing good every day. For more information about us, visit [our website](#). I look forward to meeting qualified candidates,



**TAYLOR R. SCHULTE, FOUNDER  
CERTIFIED FINANCIAL PLANNER™**

*Define Financial, LLC is an Equal Opportunity employer. No relocation assistance is offered for this position; candidates not residing in San Diego County, CA will be responsible for relocation at their own expense. Eligible candidates will be able to provide proof of eligibility to work in the United States without support; sponsorship is not available.*

## QUALIFICATIONS

We want someone with the desire to do – and takes pride in doing – a good job. You don't need to have experience in financial services – or even the software we use. However, you need to bring the skills expected of a Rockstar Client Service Manager including:

- Attention to detail
- Excellent written and verbal communication skills
- Commitment to personal growth
- Inter-personal skills, technical skills, and the desire to learn (This includes learning new software!)
- Ability to handle stressful situations
- Problem solver

## OUR HIRING PROCESS

As a small-and-growing business, we can only afford to hire the best. If you think this job could be for you, please send an email to [rockstar@DefineFinancial.com](mailto:rockstar@DefineFinancial.com) with your resume + a single page PDF cover letter describing what makes you the best we can hire and why you would like to join our team.

- If we LOVE your cover letter, our lead planner, Jon Luskin, will schedule a brief phone interview to ask the first round of screening questions.
- If Jon LOVES his conversation with you, we will have you complete a personality assessment, as well as a couple of sample-tasks to test your abilities.
- If you BLOW OUR MIND with Step #2, we'll invite you into the office for a formal interview with Jon and our founder & CEO, Taylor Schulte.
- If you BLOW OUR MIND in the interview, the last step will be to grab lunch or dinner with our team, just to make sure we all like each other before committing to working together.

Ultimately this process is designed so that once hired, our team and our client's all remark "Where did you find this person? They are AMAZING!"

*\*Our office is very busy, so please do NOT try to contact our team through any method other than submitting your resume and cover letter as described. All other attempts to reach our office will be ignored.*

*\*Due to the financial nature of our work and the age of our clients, you will be required to be fingerprinted and pass a thorough criminal background check and credit check. The credit check doesn't need to be spotless, just not have anything that could put our clients at risk.*

*\* Please visit [www.definefinancial.com](http://www.definefinancial.com) to learn more about our office.*