Prime Financial

Client Services Specialsit - A Client Service Specialist will play a crucial role in delivering exceptional client service and building strong relationships with our clients. You will be responsible for providing personalized support and guidance to ensure client satisfaction while also collaborating closely with our team of advisors and portfolio managers. This role requires a deep understanding of wealth management products, excellent communication skills, and a strong commitment to delivering superior service.

Client Relationship Management

- Build and maintain strong relationships with clients, providing prompt and professional assistance.
- Act as the primary point of contact for clients, addressing inquiries, resolving issues, and providing updates on account activities.
- Assist in client onboarding and account setup processes.

Administrative Support

- Handle administrative tasks such as scheduling appointments, managing calendars, and coordinating meetings for Financial Advisors
- Prepare and process client documentation, including account forms, transfer requests, and account updates.
- Maintain accurate and up-to-date client records in the firm's CRM system.
- Assist in preparing reports, presentations, and other materials for client meetings and reviews.

Operational Efficiency

- Collaborate with internal departments to ensure seamless operational processes and timely execution of client requests.
- Coordinate with Custodians, third-party teams, and internal WM Operations team to facilitate account transfers, fund transfers, and other transactions.
- Monitor and follow-up on pending client requests and ensure timely completion.
- Stay up-to-date and proficient in all technologies required for this role.

Compliance and Regulation

- Comply with Prime Capital Financial's and FINRA policies and procedures based on a registered or non-registered position.
- Please adhere to all compliance policies, procedures, and regulations.
- Assist in maintaining client confidentiality and data privacy.

Continuous Improvement

- Identify opportunities for process improvements and suggest solutions to enhance operational efficiency and client experience.
- Stay updated on industry trends, regulations, and best practices related to wealth management and client service, as well as all company and custodial changes to policy, procedures, forms, and other daily operations. Attend all offered training sessions relevant to this role.
- Willingness to learn, grow, and change to keep up with the consistent changes in the wealth management industry, technology, rules & regulations.
- Maintain client engagement programs, such as gift cards, outreach, and marketing seminars and efforts to enhance the advisor's business and the overall client experience.
- Exercises correct security procedures for personal workspace.

Direct link to the application here.

AMWINS

Associate Broker, Commercial Insurance - Join our Amwins Brokerage team in Springfield as an Associate Broker! This position is on-site. None of our positions are commission-based or involve cold calling.

Each Associate Broker provides vital team functions:

- Review & build submission information required to issue new or renewal quotes
- Analyze new and renewal submissions and provide market selection
- Determine coverage needs and develop proposals
- Review and handle inspection recommendations and discrepancies
- Develop relationships with new and existing agency and underwriter partners
- Receive and respond to calls/requests concerning problems, delays, discrepancies, etc. and provide resolution so that all parties are satisfied
- Oversee or delegate endorsement requests, signed applications, forms, underwriting information, tasks, and certificates of insurance to carriers
- Monitor various reports for consistency
- Other duties as assigned based on team need

Direct link to the application here.

Mercer Advisors

Financial Planner - Financial planning is the foundation of Mercer Advisors. The Financial Planning Group is a centralized team of paraplanners that supports Wealth Management Teams nationwide by creating customized, comprehensive personal financial plans.
This role is responsible for document analysis, data management, financial plan construction, ongoing maintenance, and implementation. Membership in the Financial Planning Group offers an excellent opportunity for individuals seeking to build strong technical expertise in preparation for a career in financial planning or as a future Wealth Advisor.
In this role, you will prepare comprehensive financial planning modules using a variety of industry-leading software and proprietary tools. You will collaborate closely with in-house specialists in investments, tax, estate planning, and insurance solutions. Success in this position requires a genuine passion for financial planning, along with self-motivation, flexibility, strong attention to detail, a process-driven mindset, analytical skills, high follow-through, and excellent communication abilities.

The Financial Planner’s responsibilities include, but are not limited to:

- Preparing financial plans for prospective and existing clients, including:
    - Cash flow and spending plans
    - Investment analysis
    - Retirement projections
    - Social Security analysis
    - Education funding analysis
    - Stock options analysis
    - Estate planning analysis
    - Tax planning
    - Asset protection and risk management needs analysis
- Partnering with sales teams and advisors to collect and review client documentation required for financial plan preparation.

- Utilizing financial planning tools such as eMoney, Morningstar, SS Analyzer, Excel, CRM systems, and portfolio analysis tools to develop client financial plans.
- Collaborating with sales and Wealth Advisor teams to deliver an exceptional, seamless client experience with a focus on accuracy and timeliness.
- Working cross-functionally with teams within Family Wealth Services and Investments to develop integrated client strategies and tailored recommendations.
- Staying current on financial planning topics, including cash management, investments, wealth transfer strategies, complex retirement planning, Social Security, and tax planning.
- Assisting in the creation and implementation of workflows and procedures to improve efficiency and enhance team processes.

Direct link to the application here.

GLS Insurance

Commercial Lines Account Manager – The Commercial Lines Account Manager serves as a trusted point of contact for our commercial clients, delivering exceptional service and expert guidance across all aspects of their insurance program. This role is responsible for building and sustaining strong client relationships by handling inquiries with professionalism, speed, and accuracy — coordinating seamlessly with clients, carriers, and internal team members to ensure every account is properly protected and serviced.

- Serve as the primary service contact for existing commercial lines clients, managing policy updates, coverage questions, premium payments, documentation requests, and ongoing account maintenance.
- Handle all routine and after-hours claims, guiding clients through the process with clarity and urgency.
- Respond to inbound client calls and written correspondence with professionalism, ensuring accurate and timely resolution of all service needs.
- Partner with new clients or support a producer to assess risk exposures, gather underwriting data, research carrier options, present coverage solutions, bind new policies, and cancel or transition prior coverage.
- Conduct or assist with policy review appointments — analyzing liability limits, coverage gaps, replacement cost accuracy, and rounding out accounts to ensure comprehensive protection.
- Provide detailed product and service guidance to clients; process new business quotes, renewals, endorsements, cancellations, and payments with accuracy and efficiency.
- Resolve service issues by proactively identifying root causes, communicating solutions clearly, and following up to confirm resolution and client satisfaction.
- Review policy audits for accuracy and facilitate any necessary corrections between the client and carrier in a timely manner.
- Maintain thorough and accurate records of all client interactions, transactions, and account activity within the agency management system.
- Collaborate with team members, contribute expertise

Link to the application here.

Community Foundation of the Ozarks

Development & Philanthropic Services Intern – The Community Foundation of the Ozarks is seeking a motivated student intern to assist the CFO's Development & Philanthropic Services department to provide hands-on administrative, research, and stewardship support for donor, agency partner, affiliate, and development initiatives in alignment with the Community Foundation of the Ozarks' mission, vision and values. This internship is ideal for students who have a strong interest in nonprofit and philanthropic initiatives and who are eager to learn how community-focused organizations create meaningful change.

DUTIES

- Assist the Development & Philanthropic Services department with the following:
- Planning, preparation, and stewardship touchpoints for funds
- Maintain updated donor and agency partner fund packets for internal and external use
- Provide general database support including updating contact information for constituents, generating reports, and fund summaries.
- Support website updates related to agency partners
- Compile, track, and help coordinate submission of beneficiary reports for Designated Endowment funds.
- Investigate discrepancies between agency fund profiles and listed fund advisors to improve data accuracy and newsletter outreach
- Assist with audits of agency funds to confirm appropriate fund types and coding.
- Cross-check Legacy Society members with deceased donor records
- Scan and upload Legacy Forms into donor profiles and opportunities
- Assist with mailings, including new Donor-Advised Fund (DAF) welcomes and fiscal-year reminders
- Update grant type fields for grantees
- Audit Charity Check Overrides for accuracy
- Provide coverage support during staff leave periods (e.g., forwarding thank-you letters, assisting with anniversary mailings, grant research)
- Review and confirm affiliate meeting dates, locations, and frequency
- Maintain and update affiliate meeting calendars
- Assist with onboarding new funds from the field.
- Explore and document options for tracking planned gifts in C-Suite
- Support advisor outreach and stewardship efforts
- Assist with projects related to Development or Professional Advisors Council initiatives as assigned
- Other duties and responsibilities, as assigned.

POSITION EXPECTATIONS

- 15-20 hours per week
- It is anticipated that the internship will start in April 2026 and end in August 2026
- Rate of compensation: $16 per hour
- Must possess a valid driver's license and have a good driving record.

Interested students: Please submit a cover letter, and resume and employment application to Ashley Silva, Vice President of Development & Philanthropic Services at asilva@cfozarks.org. Date of first consideration is March 31. If you have questions, please e-mail or call Ashley Silva at 417-864-6199

Community Impact Intern – The Community Foundation of the Ozarks is seeking a motivated student intern to support the work of the Director of Community Impact. This internship is ideal for students who have a strong interest in nonprofit and philanthropic initiatives and who are eager to learn how community-focused organizations create meaningful change. The selected intern will gain hands-on experience collaborating with local and regional nonprofit partners. This role offers a valuable opportunity to develop practical skills, build professional connections, and gain insight into the inner workings of the nonprofit sector.

DUTIES

- Assist the Director of Community Impact with the following:
- Assist in the management of the Grant Lifecycle Manager, the online portal for all grantmaking services at the CFO, including being the main point of contact for technical assistance to potential and current grantees.
- Facilitate the accounts payable administrative and entry process for affiliate community foundations.
- Carry out grantmaking activities, including but not limited to affiliate community foundation and regional grant cycles.
- Other duties and responsibilities, as assigned.

POSITION EXPECTATIONS

- 15-20 hours per week
- It is anticipated that the internship will start in April 2026 and end in August 2026
- Rate of compensation: $16 per hour
- Must possess a valid driver's license and have a good driving record.

Interested students: Please submit a cover letter, resume and employment application to Ashley Fleming, Director of Community Impact at afleming@cfozarks.org. Date of first consideration is March 31. If you have questions, please email or call Ashley Fleming at 417-864-6199.