Foresters Financial

Title: Outside Investments Associate

Location: Raritan Plaza 1, Edison, NJ

Job Type: Full-time (Entry Level)

Compensation Type: Salary

Start Date: ASAP

Job Description:

Performs various clerical duties to support the processing of outside fund and outside insurance transactions for Foresters Financial customers. High volume of contact (email and phone) with FF Registered Representatives regarding outside transactions.

Primary Responsibilities:

- Review incoming mail to determine if it is in good order for processing at the specified outside fund family (ie., all appropriate forms have been submitted, the check is signed/dated properly, etc.)
- Update the mail log accordingly
- Field any emails, phone calls, correspondence and follow-up that is required
- Contact the representative for any necessary clarification and keep documentation for our records
- Once the paperwork is deemed in “good order”, the paperwork must be quality controlled, front-end-scanned, and forwarded to the appropriate outside institution
- Documents must be logged and warehoused for any necessary paperwork retrieval
- Transactions previously sent to an outside fund group must be reviewed and verified using DST Vision
- Foresters product transactions require a shell account be posted to the Company Mainframe and tracked until the policy is issued
- Back up the Networking functions to link accounts, approve commission payouts and research when necessary
- Back up the telephone transaction phone lines to accept liquidations, exchanges or maintenance requests from FF Representatives on outside fund accounts
- Compile information for reporting statistics on the department workflow
- Willing to learn other functions in the area and work on projects that arise

Qualifications:

- Bachelor’s degree
- Self-starter
• Ability to multi-task and work in a team environment
• Ability to clearly communicate both verbally and in writing
• Strong organizational and follow-up abilities
• Detail oriented
• PC experience (preferred - in Microsoft Access, Word and Excel knowledge a plus)
• Pleasant phone manner
• Reliable/willingness to work overtime, as needed (after 5:00 p.m.)
• Motivated, focused and strong desire to learn and grow in the Company

Application Instructions:
Please submit resume to company website: forestersfinancial.com/careers.

About the Organization:
Established in 1930, Foresters Financial is a financial services firm with administrative and operations offices located in Edison, NJ and on Wall Street, and regional sales offices located nationwide. Our New Jersey location seeks an Outside Investments Associate.

Foresters Financial is an Equal Opportunity Employer