



## Financial Wellness Services Coordinator

**Are you a highly motivated professional and master multi-tasker? If so, we want to talk with you!**

Francis LLC provides financial wellness programs and individual financial planning within the workplace, delivering services on-site and on-the-go. We think the traditional wealth management business is too focused on the wealthy. Francis delivers the money advice that organizations and their employees desperately need through an employer-sponsored financial wellness benefit. Our Financial Planning team is focused on helping others achieve the Work-Life-Money Balance that leads to strong financial futures and more fulfilling lives.

Our ideal candidate is organized, willing to work hard, and derives great satisfaction in serving both internal and external clients.

Here's what you'll do:

- Coordinate the delivery process of financial wellness programs and events.
- Assist with the development, design, and distribution of educational and marketing materials.
- Manage subscription and software tools.
- Compile reports and reviews for client use.
- Provide professional, friendly service to clients and participants.
- Complete administrative duties, as needed.

Qualifications include:

- Bachelor's degree, preferably in a business, finance, or education field.
- Excellent organizational skills and attention to detail.
- Strong written and verbal communication skills.
- Fluency in additional languages is a plus.

This is a unique opportunity to join the Francis team as a full-time, salaried coworker enjoying a generous benefit package, including a sabbatical program and collaborative work environment. This position is based out of our Brookfield, WI office, but will also support our remote Financial Planning team members.

### Who We Are

Francis LLC is a nationally recognized and award-winning retirement plan consulting and financial education organization with offices in Brookfield, WI, and Minneapolis, MN. We provide investment consulting and participant financial wellness education to qualified retirement plan sponsors and their participants. As an independent Registered Investment Advisor with no broker/dealer affiliations, Francis does not sell investment products nor receive compensation from the organizations or investment product we recommend. Francis currently consults to over \$12.5 billion in customer assets.

### Application

Send resume to Susan Salmon, Director of Operations, at [susan.salmon@francisway.com](mailto:susan.salmon@francisway.com).

The above statement reflects the general details necessary to perform the principal functions of the position described and shall not be construed as a detailed description of all the work requirements that may be inherent during your employment.