

Stakeholder Support Specialist

Certified Financial Planner Board of Standards (“CFP Board”) – headquartered in Washington, D.C. – is the certifying body for financial planning professionals. It is a non-profit organization that fosters professional standards in personal financial planning through its setting and enforcement of the education, examination, experience, ethics, and other requirements for the CFP® certification.

This position normally operates in a professional office environment. However, remote work may take place due to COVID-19 and any other pandemic or for any reason as determined by CFP Board’s CEO.

CFP Board seeks a highly motivated team player to serve as Stakeholder Support Specialist. The successful candidate serves stakeholders by determining certification requirements; answering inquiries; resolving problems; and, fulfilling requests via a customer relationship management (CRM) system. Supports the reception area and assists with other certification administrative functions. The ideal candidate will embrace open collaboration, possess intellectual curiosity and help the organization deliver results towards fulfilling our mission.

Essential Functions

- Maintains a thorough understanding of all CFP Board activities so as to properly respond to a variety of inquiries
- Answers incoming stakeholder phone calls and email, takes appropriate action for each communication
- Resolves problems by clarifying issues; researches and explores answers and alternative solutions; implements solutions; escalates unresolved problems
- Uses company policies to determine if there can be an immediate resolution to a customer matter or if that matter requires managerial input
- Documents all call information according to standard operating procedures
- Follows up customer calls where necessary
- Assists with online application processing
- Reviews return mail and takes appropriate actions
- Attends mandatory training sessions to stay up-to-date on product or company policy changes
- Participates in special projects or support to various departments, as approved by supervisor
- Maintains position desk reference book
- Provides back up to the receptionist
- Performs other duties as assigned

Background/Skills/Abilities Preferred

- A minimum of 1 year administrative or program support, or commensurate educational experience
- Ability to understand and adhere to rigorous policies, procedures, and standards.
- Proficiency in Microsoft Office
- High level of professionalism

- Error-free writer with strong proofreading skills and high attention to detail
- Ability to prioritize and manage multiple projects, and follow through on issues in a timely manner
- Exceptional interpersonal communication skills
- Ability to adapt quickly and readily to change
- Ability to work and collaborate as a part of a motivated, driven team

To apply, send your resume and one-page letter summarizing your interest, qualifications and salary expectations. Please reference the Stakeholder Support Specialist position in your cover letter. Email your application to humanresources@cfpboard.org, Attention: Director, Human Resources, CFP Board, 1425 K Street NW, Suite 800, Washington, DC 20005.

CFP Board believes that diversity of experience and perspective are strengths and seeks to continue to grow a highly committed, skilled and collaborative staff.