

Phillip Capital Inc. Employment Opportunity in Chicago Customer Support Specialist

Phillip Capital Inc. seeks a Customer Support Specialist interested in joining a self-clearing FCM and Broker Dealer. The Customer Support team works closely with FCM/BD clients and brokers on customer service issues and funding requests. The ideal candidate should have a respectful demeanor, enjoys helping others, interest in the financial markets and the ability to thrive in both independent and team scenarios.

Responsibilities

- Respond to customer and broker enquiries via phone, email, and ticketing system in a professional and timely manner, adhering to company guidelines and procedures
- Verify a customer's identity following company guidelines prior to providing customers with information about their account or updating customer information
- Receive customer funding requests and coordinate client payments through a daily process including other departments
- Assist existing customers with questions about their accounts, including but not limited to client statements, fees, and using the customer portal
- Provide general support to Introducing Brokers, including but not limited to customer commission setups, fee adjustments and funding requests
- Onboard and set up new customers and brokers in PCI's back office and portals
- Document and escalate issues to other departments when required, conduct follow up
- Cross train with the New Accounts team and serve as backup
- Coordinate with and support other internal departments

Minimum Qualifications

- SIE and Series 7 required within 120 days of start
- Strong client services skills, ability to communicate respectfully and efficiently
- Ability to work in a time sensitive and often pressured financial markets environment
- Accuracy and the ability to understand and prioritize customer and broker request urgency
- Proficiency in Microsoft Word, Excel and Outlook strongly preferred. SharePoint and Teams knowledge a plus
- Ability to absorb and analyze information quickly and effectively
- Clear communicator and willingness to work closely with internal departments
- Willingness to take on or manage projects to improve processes or the overall customer experience
- Results oriented, efficient, and ability to learn from mistakes

Preferred Qualifications

- Bachelor's Degree
- Prior experience in a Customer Service setting
- Basic understanding of futures and securities products, trading, and financial processes
- Ability to speak other languages fluently a plus

Please send a resume to careers@phillipcapital.com to be considered for this position with "Customer Support Specialist" in the subject line. Phillip Capital Inc. will not consider candidates sent by recruiters for this position.

About Phillip Capital Inc. and the Phillip Capital Group

Phillip Capital Inc. is a growing SEC registered securities self-clearing broker-dealer and Futures Commission Merchant (FCM) firm based in Chicago. Phillip Capital Inc. has clearing memberships with CME Group, DME, ICE US, ICE EU, OCC, NFX, CFE, and DTCC. Find out more at www.phillipcapital.com and www.phillip.com.sg.