

Location: Phoenix, AZ | Ridgeland, MS | Minneapolis, MN | Dallas, TX

Department: Corporate Solutions | Client Services

Employment Type: Full-Time

At **Balefire Wealth**, we're redefining what it means to be a financial advisory firm. The future of wealth management is collaborative, innovative, and deeply personal—and we're building a team that reflects that vision.

We are seeking a Corporate Solutions Associate to support our Corporate Solutions team in delivering exceptional service to employer groups, healthcare organizations, and corporate clients. This role is ideal for someone who thrives in a collaborative, fast-paced environment and enjoys balancing client service, operations, and project management. The Corporate Solutions Associate ensures seamless execution of financial wellness programs, insurance solutions, and corporate benefit offerings while maintaining strong communication across internal teams.

Key Responsibilities

Client Program Support & Onboarding

- Assist in onboarding new corporate clients, including financial wellness programs, healthcare partnerships, and insurance plan implementations.
- Maintain accurate client records in Practifi and other platforms, including program details, service schedules, and key contacts.

Tools & Systems Management

- Manage and update key business systems such as Practifi, ShareFile, DocuSign, and insurance/benefits carrier portals.
- Support Corporate Solutions reporting and tracking across wellness programs, claims data, and insurance renewals.

Vendor & Carrier Coordination

- Act as a liaison between advisors, insurance carriers, healthcare partners, and employer clients.
- Assist with vendor communications, renewal tracking, benchmarking, and reporting.

Corporate Client Reporting & Projects

- Prepare quarterly and annual reporting for employer clients, including participation metrics, utilization data, and outcomes reporting.
- Support project-based initiatives such as new program launches, open enrollment campaigns, corporate surveys, and client events.

Scheduling & Internal Collaboration

- Coordinate client meetings for firm leadership and advisors.
- Serve as a liaison between Corporate Solutions, Financial Wellness Coaches, and internal Balefire teams to ensure consistent delivery of services.

Insurance & Benefits Support

- Support the Corporate Solutions team with insurance plan reviews, claims reporting, and benefits plan updates.
- Assist with compliance and documentation related to insurance and corporate benefit offerings.

Finance & Revenue Support

- Prepare documentation related to corporate program revenue, insurance commissions, and vendor payments.
- Communicate changes to internal accounting to ensure accurate billing and revenue tracking.

Documentation & Reporting

- Create and maintain reports, spreadsheets, and program documentation to support planning, decision-making, and client presentations.

Qualifications

- **Strong administrative, organizational, and client service skills**
- **Proficiency with CRMs and digital business tools; experience in insurance, healthcare, or financial services preferred**
- **Ability to manage multiple priorities with attention to detail**
- **Excellent verbal and written communication skills**
- **Proficient in Microsoft Office (Outlook, Excel, Word, PowerPoint, Adobe)**

Why Balefire

- Collaborative, team-oriented culture.
- Opportunities for professional growth and advancement.
- Competitive compensation and benefits package.
- A chance to shape the future of wealth management with an innovative, people-first firm.

Balefire

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 www.balefirewealth.com