

Position Description

Title: Administrative Assistant

Reports to: HR Manager

Benefits: Medical, Dental, Vision, Life, FSA, 401(k), Paid-Time Off, Paid Holidays

Job Summary

The Administrative Assistant will assist the department heads with various administrative tasks and procedures. This individual will primarily work closely with human resources, operations, and the accounting department. This position will use a variety of computer programs including CRM, HRIS, Microsoft Office, and custodian platforms.

Duties and Responsibilities

The Administrative Assistant can expect to focus in the following areas:

- Perform data entry tasks
- Assists the Accounting department with billing and bookkeeping.
- Assists the HR department with employee relations, payroll, benefits, and other various HR tasks.
- Assists the Operations department with various administrative tasks.
- Scanning, faxing, and filing of paperwork.
- Prefilling documents and completing DocuSigns.
- Paperwork processing and follow-up.
- Renaming, filing, and processing paperwork daily.
- Escalate issues or complex tasks to appropriate personnel.
- Assist with onboarding new advisors and clients as needed.
- Maintain all client, advisor, and employee files in orderly manner.
- Follow operational procedures
- Other duties as assigned

Requirements and Qualifications

- Bachelor's degree from an accredited college or university. Preferably in the fields of business or finance.
- Investment management industry experience preferred. Particularly in an advisor support role.
- Securities Industry Exam, completion required within 6 months following date of hire.
- Solid strategic thinker and problem solver.
- Strong organizational and project coordination skills with the ability and experience to handle and prioritize multiple assignments and conflicting deadlines, while providing a high level of client service.
- Strong attention to detail, ability to transfer data accurately.
- Ability to work effectively under pressure with tight deadlines, with attention to detail, and the ability to handle conflict and negotiate resolution.
- Ability to be responsible for confidential and time sensitive material.
- Proficiency with windows-based software (e.g. Word, Excel, and PowerPoint) and Outlook is required.
- Excellent written and verbal communication skills – clear, concise and organized.
- Ability to work in a team-based environment, proactively covering and sharing task responsibilities with other team members.
- Be self-motivated, show initiative and creativity in all aspects of work (e.g. creating new methods to streamline tasks).
- Work independently with little supervision and knows when to ask for guidance, clarification, assistance.
- Possess a high level of professionalism, confidentiality, discretion and judgment.
- Team player, with strong coaching and listening skills
- Desire/ability to work successfully in a small company environment