

Job description

Growing financial services firm is seeking a diverse Administrative Assistant to perform a variety of tasks. Duties of the Administrative Assistant include providing support to our team of financial professionals, assisting with client events and seminars, assisting in daily office needs and managing our company's general administrative activities. The ideal candidate thrives in a team environment and will be responsible, highly organized, detail-oriented, friendly and well-spoken.

Job Responsibilities:

- Answer and direct phone calls
- Organize, schedule and remind clients of appointments
- Greet and welcome office visitors
- Plan meetings and take detailed notes/minutes
- Write and distribute email, letters, faxes and forms
- Assist in the preparation of reports, statements, templates and new client materials
- Track and provide status updates on new cases and funds transfers
- Work closely with advisors to schedule and prepare for client events and seminars
- Attend client events and seminars; interact with clients to ensure we are delivering a positive overall experience
- Manage incoming and outgoing office mailings
- Order office supplies and research new deals and suppliers
- Maintain updated contact lists and customer information in CRM and email marketing systems
- Coordinate with office staff and executives to handle requests and provide support as needed

Job Skills and Qualifications:

- Proven experience as an administrative assistant, virtual assistant or office admin assistant
- Knowledge of office management systems and procedures
- Working knowledge of office equipment, like printers, copiers and phone systems
- Proficiency in Microsoft Office (Word and Excel, in particular)
- Excellent time management skills and the ability to prioritize work
- Attention to detail and problem-solving skills
- Excellent written and verbal communication skills
- Strong organizational skills with the ability to multi-task

Preferred:

- Previous experience as an Administrative Assistant, Executive Assistant, Secretary, or Office Manager

- Previous experience in insurance, investment management, tax preparation, mortgage and/or legal services

- Bachelor's degree in business, marketing, accounting or finance

Job Type: Full-time

Pay: \$38,000.00 - \$42,000.00 per year

Benefits:

- Paid time off

Schedule:

- Monday to Friday

Supplemental pay types:

- Bonus opportunities

Ability to commute/relocate:

- Raleigh, NC 27612: Reliably commute or planning to relocate before starting work (Required)

Experience:

- Customer service: 1 year (Preferred)

Work Location: In person