



# Administrative Assistant Job Description

## **Position Purpose:**

Joining a well-established and growing practice, the Administrative Assistant will work to deliver service and manage relationships with an existing client base and support the licensed assistants and client service associates in the office.

## **Client Service**

- Greet all visitors and callers with a warm and welcoming first impression
- Make polite conversation with visitors to assure they feel comfortable while waiting for their appointment
- Maintain a professional appearance and image at all times
- Provide efficient and professional administrative support to all licensed assistants and client services associates
- Understand the importance of maintaining the highest level of client confidentiality at all times
- Plan and schedule meetings, respond to simple inquiries, manage communication via email and phone calls
- Ensure all schedules and appointments are adhered to
- Organize and accurately maintain filing system of confidential information

## **Client Care**

- Utilize existing electronic client management system for documenting interactions with clients and follow up tasks
- Work with all members of the team to provide excellent support
- Work with licensed assistants and client services associates to help answer basic client questions and offer problem resolution
- Follow-up, either verbally or in writing, to ensure complete client satisfaction
- Maintain electronic files and records in accordance with the records retention policy and compliance

## **Marketing and Client Acquisition**

- Client mailings such as newsletter, form letters and other basic correspondence
- Organize client and staff events and seminars
- Order and send gifts, flowers, cards, etc.
- Ensure proper inventory of office SWAG items

## **General Office Support**

- Maintain high level of office appearance inside and outside our facility
- Keep inventory stocked and order supplies as needed
- Daily mail run, miscellaneous office errands and general courier needs

## **Key Traits of a Successful Administrative Assistant**

- Initiative
- Strong interpersonal skills
- Outgoing personality
- Proficient in Microsoft Office programs
- Ability to learn and adapt quickly
- Direct attention to detail and organization
- Effective and efficient in self-management
- Warm and welcoming personality that easily connects with a variety of people
- Ability to multi-task
- Ability to adhere to rules and regulations as stated and required by the Practice and FINRA
- Positive attitude and sincere willingness to constantly learn and grow
- Experience in the financial services industry is a plus

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