True Blue
FINANCIAL
A REGISTERED INVESTMENT ADVISOR

Administrative Assistant Job Description

Full time
Compensation: $17-22 per hour based on experience and qualifications

Position Purpose:
The Administrative Specialist is an entry-level position and is part of the Operations group that supports the Advisory teams. Administrative Specialist responsibilities include client service administration, administrative support, and operations support. The role works to deliver client service and assists in maintaining client relationships.

Client Service

- Welcome all callers and visitors with a warm first impression. Make polite conversations with visitors to ensure they feel welcome while waiting for appointments.
- Schedule client meetings, respond to simple account inquiries using system tools, and manage communication via e-mail and phone calls.
- Work with advisors and operations team to help answer basic client questions and offer problem resolution.
- Utilize Redtail, the electronic client relationship management (CRM) system, for documenting interactions with clients and follow up tasks.
- Always maintain the highest level of client confidentiality.

Client Administration Support

- Administer client mailings such as form letters and other basic correspondence.
- Assist with client appreciation or other events.
- Order and send client gifts, flowers, cards, etc.
- Monitor SWAG inventory and re-stock offices.

General Office Support

- Order and stock office supplies.
- Run office errands, daily mail pick-up, and general courier needs such as groceries.
- Assist in maintaining the appearance of the office at a high standard, both inside and outside.

Operations Support

- Provide first level Help Desk support to clients for Account View & investment statements.
- Maintain logs and electronic files and upload to ClientWorks in accordance with records retention policy and compliance requirements.
- Complete tasks in Redtail CRM system for workflows, imaging, and reporting.
- Assist with transactional tasks and client service paperwork provided by Operations Specialists.
- Administer check deposits to client accounts.
- Support tasks requested by Advisors, such as confirming account changes, etc.

Tax Support

- Provide administrative support to tax clients during tax season to answer general process questions, facilitate return pick-up process, and schedule appointments when needed.
- Serve as a liaison between clients and tax preparers to facilitate communication and the exchange of information, and print uploaded client documents.
- Additional tax responsibilities may include scanning of tax documents and tax folder preparation as requested.

Team Responsibilities

- Work with members of the Advisory and Operations teams to provide excellent client service.
- Provide efficient and professional administrative support to our internal team.

SKILLS REQUIRED AND SKILLS DEVELOPED

Administrative Specialists are expected to develop their skills in the following areas:

- Microsoft Office tools
- Business software systems knowledge – Redtail, ClientWorks
- Client and internal communications

Rev 9/1/26