

Administrative Assistant

Do you have a passion for delivering superior customer service while being a key player in the essential daily functions of a successful office? Our busy financial planning firm located in Cleveland, OH is looking for a strong Administrative Assistant. This individual will be responsible for a variety of pertinent tasks, allowing the financial advisor to focus on the continued growth of the business.

The ideal candidate will have superior administrative skills, a strong work ethic, attention to detail and enjoy working directly with clients on a daily basis. If you are looking for an amazing career opportunity in a fast-paced environment, please apply today! The below job description outlines the responsibilities for the Administrative Assistant.

Minimum Requirements:

- 2+ years of Administrative office experience in a fast-paced environment
- Financial Industry experience is not required but someone that is willing to go that extra mile
- Intermediate to advanced skills with MS Office Suite, specifically Excel
- Desire to obtain long-term employment

This position requires that you possess the following skills:

- Ability to prioritize projects and manage time
- Savvy customer service to include excellent communication both verbal and written
- Strong follow-through
- Good-natured, positive attitude
- Ability to demonstrate persistence to achieve quality

Responsibilities:

Office Administration and Client Service Work:

Assisting the Financial Advisor in managing the branch office to exceed client and regulatory expectations include:

- Answer phones & greet clients in a friendly, positive and warm manner
- Be the 1st point of contact for prospects and clients
- Maintain office supplies and out-going correspondence
- Assist clients with issues and concerns
- Build and improve upon client relationships
- Database management
- Assist with client inquiries regarding their account
- Set appointments with prospect & clients & assist Advisor with calendar management
- Pre-appointment preparation including compiling account summaries
- Maintain office filing system; both paper and electronic
- Complete & process new client applications
- Record notes from client conversations
- Assist with various marketing objectives
- Other industry-specific tasks as needed

Presented by Advisor Employee Services

Thank you for your interest in the Administrative Assistant role in Cleveland, OH. Advisor Employee Services, a consulting firm located in Overland, Kansas, represents the *top 1% of financial advisors in all 50 states* in their hiring needs. Please take a moment to explore our website and the services provided. We are not a staffing firm, but together have built a reputable and continuously expanding business model which allows us to pinpoint the exact personnel needs of these established financial advisors. If you feel that you have the skills it takes for the position responsibilities listed, please apply today!