



<https://armyengineer.com/job/administrative-assistant/>

Administrative Assistant

Description

The Administrative Assistant will play a vital role supporting our Financial Advisors who work with clients to achieve their financial goals. This role is critical to ensuring all clients feel welcome and receive exceptional service in all interactions with the firm. You will collaborate with Advisors, Home Office personnel and business partners to fulfill client requests.

Responsibilities

As a key member of our local support staff team, you will:

- ☑ Promote a consistently exceptional client experience
- ☑ Schedule and confirm client appointments, and prepare all required paperwork/workflows
- ☑ Submit required forms and follow up with appropriate business partners/internal departments to ensure the request is completed
- ☑ Assist in problem resolution and act as the Advisor liaison with various business partners as well as the Home Office
- ☑ Maintain Advisor sales and commissions records as needed
- ☑ Work with the district and office to maintain a marketing events calendar and plan, and assist with marketing events as needed
- ☑ Manage office communications, Advisor business tracking, and record keeping requirements for compliance purposes

Qualifications

Excellent organizational, written and verbal communication skills

- ☑ 1 to 2 years general office experience
- ☑ Proficient in basic computer skills and Microsoft Office, specifically Outlook, Word and Excel
- ☑ Ability to handle multiple tasks and thrive in a fast-paced environment
- ☑ Self-motivated
- ☑ High school diploma
- ☑ General knowledge of financial products preferred
- ☑ Satisfactory completion of background check, fingerprinting and required employment documentation, as well as any screening/hiring tool if required by hiring district

Job Benefits

- ☑ Competitive wages
- ☑ Pleasant work environment
- ☑ Opportunities for professional development
- ☑ The ability to be in control of your career trajectory
- ☑ Portable career opportunities throughout the United States and overseas

Contacts

Hiring organization

Army Engineer

Job Location

United States

Date posted

August 18, 2020

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