Administrative Assistant for Fee-Based Advisory Firm

Integrated Financial Planning Center

Austin, TX

Salary: $35,000 to $50,000 Annually (plus bonus)

Type: Full-Time

Summary:

If you find yourself looking for a fulfilling career, the Administrative Assistant role may be the right opportunity for you. AAs team up with financial advisor(s) to help clients achieve their long-term financial goals. Our AAs are a valued part of the client team, and we welcome your unique experiences and professional backgrounds to help with servicing clients. We value different viewpoints to help achieve results.

The AAs are an integral part of servicing our clients and financial planners. They are responsible for providing excellent service, support, follow-through and administrative tasks with the purpose of delivering an exceptional client experience. They specialize in client experience to ensure that our firm is an efficient and organized office allowing the advisor to focus on building client relationships.

Key Duties & Responsibilities to Include but Not Limited To:

- Service clients needing servicing in the absence of the financial advisor.
- Answer incoming calls, scheduling / confirming appointments, sending client communications
- Welcoming clients and guest professionally
- Setup conference room for guest and clients
- Coordinate client events
- Excellent client service, verbal and written communication skills
- Strong workflow management skills
- Ability to apply sound judgment in decision making
- Ability to function in a fast-paced environment without sacrificing quality
- Strong computer skills required, including effective use of Microsoft Office applications and Internet Explorer
- Willingness to learn new office technology
- Equivalent work experience is preferred
- Ability to deepen and broaden client relationships
- Comfortable in your ability to identify opportunities to create efficiency
- Strong ability to work independently (at times remotely)
- Ability to manage multiple priorities in a deadline driven environment
- Willingness to learn how financial services/markets work
- Willingness to develop a working industry knowledge and overall familiarity with relevant internal and Broker-Dealer resources
- Be available for other projects as needed / assigned

Skills Required:

- Understanding and proficiency are required in regard to customer relationships, customer service, data entry, confidentiality, problem resolution and MS Office products such as Word, Excel, Outlook, CRM, and Financial Databases.
- Administrative experience
- Customer Service Experience
- Applicant must be able to pass a routine background check to be eligible.
- Must pass a drug test

Optional:

- Minimum of 1-3 years previous experience in securities industry
- Spanish speaking ability
- Knowledge of firm guidelines concerning NASD/State securities registration, trading practices, investment suitability and proper disclosure of product information
- Two or more years in brokerage/financial services, banking, operations, and client support.

What's in it for you?

We thrive on the challenge to be our best, innovative thinking to keep growing and working together to deliver trusted advice to help our clients thrive and communities prosper. We care about each other, reaching our potential, making a difference to our communities, and achieving success that is mutual.

- A dynamic, collaborative, and high-performing team
- Opportunities to do challenging work and grow your career
- Work-life integration
- Annual bonus program
- Leaders who support your development
- A dynamic, collaborative, and high-performing team
- Opportunities to do challenging work and grow your career

Important Acknowledgment:

I. You acknowledge that is an "at-will" employer and if you are hired, you will have the right to resign from your employment at any time, with or without notice, and we would have the right to modify or terminate your employment at any time, with or without cause, and with or without notice.

II. You acknowledge that if hired we may, in its discretion, obtain and use background information concerning your credit, character, general reputation, personal characteristics, work habits, performance and experience for evaluation for your potential employment.

Company: Integrated Financial Planning Center
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