

Administrative Assistant- Client Services

Job Description

We are seeking a personable and detail-oriented Administrative Assistant to provide a wide variety of staff support and clerical services to management under limited supervision. As an Administrative Assistant, you will follow established procedures to perform standard tasks and resolve most questions and problems. You will also maintain routine contact with internal and external customers to obtain, clarify or provide facts and information as you project a professional image. Must have some investment, banking or financial experience.

Job Responsibilities

- Providing office support including answering telephones, assisting clients and resolving and/or referring problems or inquiries
- Have regular interaction with clients
- Scheduling and coordinating meetings, events, interviews and appointments
- Preparing reports by performing information gathering and analysis
- Establishing, maintaining and updating files, databases, records and/or other documents
- Transcribing and preparing correspondence, agendas and documents
- Staying up-to-date with modern office management methods and techniques
- Operating standard office equipment and using required software applications
- Bookkeeping and excel based functions
- Performing other duties and responsibilities as assigned

Job Requirements

As an Administrative Assistant, you must possess a professional and service-oriented demeanor with pleasant and business-appropriate phone manners. Our ideal Administrative Assistant works ethically and with integrity, maintains client and firm confidentiality and upholds a professional image with external and internal business contacts. You must have excellent verbal communication and organizational skills to prioritize and complete work efficiently. You must also have effective problem-solving skills to resolve routine client questions. Must be comfortable with numbers and computers.

- Minimum 2 years administrative experience
- Experience in investments, banking or financial services
- Proficiency with Microsoft Office Suite to produce professional documents
- Mathematical abilities to gather data involved in preparing reports
- Ability to work on multiple projects simultaneously and follow instructions and adhere to deadlines
- Ability to closely monitor details and ensure that reports, correspondence and databases are accurate
- FINRA Series 7 preferred (or to be obtained within 3 months of employment)
- A background check will be required
- 5 days/week, 7:30AM-4:30PM

Please visit our website to learn more about our firm: www.WagenerLee.com
To apply, please send cover letter and resume to: Amanda@WagenerLee.com