

About Us

We are a growing S.E.C.-registered investment advisory firm that has been awarded the Top Financial Advisors 2020, Investment News Best Places to Work 2021 for Financial Advisors, and winner of the Ethics in Business and Community Award multiple years in a row. We have a fun, collegial environment with significant opportunities for advancement.

What We Are Looking For

We are looking for a friendly, professional person to add to the team in the role of Administrative Associate. Duties will include welcoming all Per Stirling clients, handling correspondence, administrative tasks, data management and assisting the administrative supervisor with day-to-day projects. Monday through Friday, 8 am - 4:30pm.

The Ideal Candidate Will Have:

- Excellent customer service skills
- Ability to relate well with clients, advisors, and co-workers.
- Excellent organizational skills and attention to detail.
- Excellent written and verbal communication skills.
- Proficient in Microsoft Office Suite and Google Suite.
- Excellent time management skills with a proven ability to meet deadlines.
- Strong analytical and problem-solving skills.
- Must have high emotional intelligence, be calm under pressure, and efficient in both team and individual environments.

Job Qualifications:

- High School diploma or equivalent.
- Two years of related experience preferred.
- Experience in the Financial Services industry is a plus.

Essential Job Functions:

- General office management activities, such as answer phones, respond to emails, open and closing facilities, mail processing, etc.
- Assist with client mailings, process client and advisor gifts and cards.
- Update client portal documents.
- Provide marketing and firm communications support.
- Add and update client and advisor information into company systems.
- Link client data and resolve data issues.
- Process routine reports and update billing information.
- Setup and support advisors, employees, and clients.
- Back up other administrative staff as needed.
- Perform any other work assigned by Supervisor.

Compensation:

- \$35,000 - \$45,000
- 15 Days PTO + 11 Paid Holidays
- Employer pays 3% of comp to your 401K regardless of your match
- 401K 100% Vested after 60 days
- Health, Dental & Vision insurance
- Growth potential
- Tuition reimbursement - Continuing education benefits
- Friendly team environment