

Office Coordinator

Job Description

We are seeking a self-motivated and innovative Office Coordinator to assist with the administration, systems, operations and compliance of our financial services office. The office coordinator will collaborate with the management team to identify opportunities in operational efficiency, productivity improvements and assist with special projects.

Job Duties and Responsibilities

- Monitor and resolve issues with office technology (with the help of our outside technology firm)
- Identify and resolve systemic operational issues
- Initiate efficiency and productivity improvements
- Participate in human resource management activities including the onboarding process, payroll processing and PTO tracking
- Coordinate and perform a range of staff and/or operational support activities
- Provide office support including answer telephones, assist visitors and resolve and/or refer inquiries
- Schedule and coordinate meetings, events, interviews and appointments
- Establish, maintain and update files, databases, records and/or other documents
- Transcribe and prepare correspondence, agendas and documents
- Operate standard office equipment and use required software applications
- Sort, screen and distribute mail
- Deposit checks
- Prepare, send and track receipt of bills
- Manage office supplies
- Regular and timely attendance is required

Knowledge/Requirements

- Associates or Bachelor's Degree is preferred
- Experience in financial services (banking and mortgage included)
- Possess basic investment concepts and procedures used in the securities industry
- Proficient in MS Excel, Word, Outlook and PowerPoint to produce presentations, correspondence, professional documents, electronic communication and maintain spreadsheets
- Background check

Job Skills

- Analyze operational policies and processes and identify opportunities for improvement
- Fundamental project management tools, techniques and procedures
- Attention to detail while maintaining a big picture orientation
- Ability to balance conflicting resource and priority demands
- Serve as a role model and lead others in providing a high level of customer service
- Demonstrate excellent work ethic
- Communicate effectively, both orally and in writing, with all levels of the organization
- Ability to work independently as well as collaboratively within a team environment
- Skill to motivate and persuade others to achieve desired outcomes
- Service-oriented demeanor with pleasant, business-appropriate telephone manners
- Excellent communication skills to present ideas and thoughts in a clear, professional manner
- Effective problem-solving skills to resolve routine client questions

- Ability to follow instructions including a strong adherence to making and meeting deadlines
- Organizational skills to prioritize and complete work efficiently