

Office Administrator

Role: As Office Administrator, you will be responsible for both the office management and the administrative functions of our small but growing firm. We are seeking a self-motivated individual who takes initiative, improves processes, has high attention to detail, and is well liked by clients. In this role, you will coordinate office events and client meetings, prepare and complete necessary paperwork for clients, maintain an office calendar and a company task list, hire and monitor performance of outside specialists in fields such as marketing and technology, and offer other general assistance to the firm's investment advisors and clients. While much of the work is behind the scenes, you will interact with clients often.

Work schedule: This is a part-time position. The ideal candidate will work between 20 and 25 hours per week (4-5 days per week during normal business hours.) Salary is commensurate with experience and agreed upon work schedule. Hourly range begins at \$27 per hour.

The Company

CAVU Wealth Advisors is a Registered Investment Advisory firm (RIA). We provide comprehensive financial advice with the goal of helping our clients live richly. In addition to financial advice, we manage our clients' investments and liaise with their other professional advisors (legal, accounting, and insurance) to implement a coordinated financial plan. Our office is in Walnut Creek, CA. We serve approximately 50 families – but we are growing each year and are looking for motivated and talented employees who want to help others while also building a unique firm with a compelling corporate culture.

Qualifications

- A college degree from an accredited college or university
- Previous work experience with a record of success
- Strong computer skills especially with word processing and spreadsheets

Qualities

- Enthusiasm regarding CAVU's mission and values
- Strong attention-to-detail and organization skills
- A natural people-person with a high "likeability" quotient; positive, collaborative, flexible
- Integrity and discretion – two key components of trust
- A desire to take initiative, "make it better," and get things done

Next Steps:

If this sounds like you, please email us at david@cavuwealth.com. Please include a PDF of your resume.