



860 N Reading Road, Ephrata, PA 17522

(717)-690-1335

officeteam@pathwayfinancial.biz

Office Manager

Description:

The Office Manager at Pathway Financial Group is responsible for overseeing and coordinating the administrative activities of the overall office. The position will work with the licensed advisors and administrative team in managing client relationships through customer service and admin support. Training will be provided in all administrative areas of the company with a goal of a rounded knowledge base to facilitate assistance in as many areas as possible.

Role and Responsibilities:

- Coordinate the overall client experience by maximizing administrative efficiencies to provide outstanding customer service
- Manage the schedule for the Advisory and Administrative teams.
- Delegate administrative tasks throughout the team to keep the workload balanced and complete items in a timely manner
- Collaborate with the Advisory team to prioritize activities and stay current on the needs of the entire team.

Skillset for the successful Office Manager Candidate:

- Detail oriented with demonstrated organizational skills.
- Effective communicator, able to provide friendly service in all situations.
- Team player, yet independently minded and highly motivated towards continual improvement.
- Able to multi-task activities rapidly while maintaining focus on getting things completed.
- Proficient user on a wide variety of technology with good typing skills.
- Abide by industry rules and regulations.

Office Manager Duties:

- Be the main hub for the entire office – almost all activities will be coordinated through this position.
- Serve as a buffer to the licensed advisors to help protect their time constraints.
- Interact with vendors and compliance team to ensure a positive client experience.
- Coordinate client events and office marketing initiatives.
- Assist in client related tasks as needed.

Education and other Requirements:

- (Required) High School Diploma
- (Preferred) 2 years of experience in management or administrative position

Benefits:

- Set daily schedule of 9 am to 4 pm in the office. Remote work available as needed.
- Paid Holidays and Vacation
- Company retirement plan with matching contributions
- Starting salary based on experience
- Bonus opportunities available

Please submit resume and direct all inquiries to officeteam@pathwayfinancial.biz

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