

# Administrative Assistant

## About you:

You are the go-to person people can rely on. Managing calendars, updating files, jumping from system to system, cutting through swaths of emails, you don't thrive on boring days. You are not a clock-watcher and are willing to take on special projects and new challenges. You want to earn what you are worth and have a place you can grow. You don't like being micromanaged, so you take ownership of the responsibilities you're given.

## Position Responsibilities:

- ✓ **Client Service:** Receive inbound calls/emails. Update/maintain CRM. Schedule follow-up meetings and manage regular client correspondence (CRM & Constant Contact).
- ✓ **Business Processing:** Oversee financial plan process, and enter basic client data in planning software (Emoney). Interact with insurance, investment, and annuity companies during all phases of client relationship.
- ✓ **Administrative:** Manage calendars and communications. Prepare/send quarterly reports. Support marketing efforts. Manage license renewals and CEC's.

## Our ideal candidate will have (required):

- ✓ **3-5+ years of administrative support experience in the financial services industry** or a VERY SIMILAR environment.
- ✓ **Strong technical/application skills** including CRM (Red Tail preferred), MS Office suite, data entry experience, and the **ability to learn new systems and programs.**
- ✓ Attention to detail so exacting that you include a reference to Sherlock Holmes in your cover letter.
- ✓ Planning and organizational skills. You know how to organize a calendar and stay on top of multiple projects.
- ✓ Clear, concise, and professional verbal and written communication skills.
- ✓ A positive attitude and friendly demeanor – even when things get tough.
- ✓ The ability to see when someone needs to jump in to handle a project AND the willingness to be that person. (no job too small!)

This is a full-time, permanent employee position. Monday – Friday 8:30a-5p. Starting salary range is commensurate to experience (with regular performance reviews).

Interested candidates that provide a cover letter and resume to [contact@synthesiswealth.com](mailto:contact@synthesiswealth.com) will be considered for the next step in the hiring process.

No calls or walk-ins, please. We are an equal-opportunity employer.

✉ [contact@synthesiswealth.com](mailto:contact@synthesiswealth.com)

 [synthesiswealth.com](http://synthesiswealth.com)

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