



Key Position: Administrative Support

We have an amazing employment opportunity and are seeking a self-directed, highly driven individual to join our team. Our ideal candidate thrives in a fast-paced environment, embraces personal growth and wants to be challenged. We are looking for someone to grow with our company in a long-term career.

Essential Duties and Responsibilities

- Administrative support for 3 key team members
- Manage 4-6 client events annually
- Assist in client meeting preparation for progress reviews
- Maintain CRM database with a high level of accuracy

Knowledge, Skills, and/or Abilities

- Demonstrate professionalism, accountability, customer/client focus
- Ability to build relationships with clients and internal partners
- Manage multiple projects simultaneously with a high degree of competency and quality
- Highly organized, detail-oriented, and proactive
- Aggressive self-starter, with an ability to work both independently and as a member of a team
- Proficient with Microsoft Office; strong computer, technology, and office equipment skills

Education and/or Experience

- Bachelor's degree in a business-related field preferred
- 2+ years of experience in the financial services industry allowing for a good understanding of broker/dealer operations and financial services products
- Event planning experience a plus

If You Are...

- Passionate about being a client advocate
- A natural problem-solver known for your creative solutions
- Goal-oriented
- Interested in being a co-creator in your own future
- Driven by a vision and not circumstances...

Contact us at Halycon Wealth Advisors!