



**GEORGETOWN
FINANCIAL GROUP, INC.**
Helping to fund the future.

Position Title: Receptionist

About Georgetown Financial Group, Inc.

Since 1991, Georgetown Financial Group (GFG) has grown into a distinguished national full service financial services company with approximately 100 financial advisors at Cetera Advisor Networks.

As an independently managed producer group, GFG's advisors provide financial planning and wealth management services, designing and implementing detailed strategies to help our clients accumulate, protect, and transfer wealth. Integrity, leadership and compassion for helping clients is what drives our financial advisors each day.

Position Responsibilities

- Greet clients and visitors in a warm and friendly manner. Assist them in handling coats, storing luggage, getting refreshments and contacting the advisor or admin for their meetings.
- Answers all inbound calls professionally and politely.
- Check phone messages in general voicemail inbox. Forward to appropriate party.
- Have ownership of Outlook calendar for reservation of boardroom and all activities within the office. You will have access to all staff calendars, so you can make appropriate appointments with clients, along with being informed of their schedules when answering telephone inquiries.
- Office equipment and software provider upkeep. The receptionist will be responsible for the management of the office equipment, including the telephone system, copiers, faxes, and computer system. The receptionist will also be responsible for managing company software programs including, but not limited to, Financial Planning Software CRM, Proposal System, Reporting System, our IT provider, and broker-dealer operations. This responsibility includes contacting our third party providers when one of the systems fails. Contact information for all providers will be kept at the front desk with the receptionist in the event the receptionist is absent.
- Order necessary office supplies and kitchen supplies.
- Collect mail, open, and time stamp each day. Distribute to all recipients.
- Turn on all office lights, TV monitors, and office equipment upon arrival.
- Keep reception area neat and clean.
- Keep conference rooms and maintain other office spaces.
- Assists other administrative positions as requested.
- Performs other duties as assigned.

Required Skills & Experience

- High School Diploma or equivalent
- Proficient with Windows based software, including MS Word, Excel, PowerPoint
- Strong interpersonal skills – positive attitude and friendly disposition
- Strong organizational skills and ability to prioritize
- Must be dependable and punctual