**Administrative Operations Assistant**

**Description:**

Our team is actively seeking an Administrative Operations Assistant for our Newport office. A successful candidate must embody our values of treating all people with respect, never compromising our integrity, and delighting our clients. The ideal candidate will also embrace our team culture and help us fulfill our promise to care deeply about our clients and their financial lives.

**Responsibilities & Activities:**

* Support our Client Services team in ways that provide service to Wealth Advisors, clients, and potential clients
* Para-planning and preparing for client appointments; helping multiple Wealth Advisors across multiple locations
* Assisting with appointment scheduling and follow-up tasks
* Continue and maintain up-to-date knowledge and training on all programs used for financial planning and research
* Prepare/track account paperwork and ensure a seamless onboarding process for new clients
* Manage client concerns and requests

**Required Knowledge, Skills & Abilities:**

* Minimum 1 year of clerical/administrative experience
* Minimum 1 year of customer service experience
* Excellent organizational and time management skills; able to handle multiple tasks
* Excellent communication (oral and written), interpersonal, and presentation skills
* Proficient with computers
* Must be willing to complete training in our Salem office

**Benefits Include:**

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| * 100% Medical and Vision premium coverage | * Annual bonus plan |
| * Voluntary Dental benefit | * Short-term and long-term disability\* |
| * Paid time off | * Life insurance\* |
| * 10 paid holidays | * 401k plan\* |
| * Paid sick leave | * Cell phone reimbursement |
| * Paid maternity and other parent leave options | * Cappuccinos for life! |

\*Eligible after one year of employment