Career Opportunity

Symphony FINANCIAL PLANNING

ADMINISTRATIVE ASSISTANT/CLIENT RELATIONS SPECIALIST

$19–$25/hr. depending on qualifications and experience

THE OPPORTUNITY

The Administrative Assistant/Client Relations Specialist provides a combination of front desk and administrative assistant duties. The position is critical to the success of our business and carrying out the promise of our value proposition. The ideal candidate will enjoy the challenge of working with a high-functioning, collaborative team of professionals who put clients' interests first, and will also appreciate the opportunity to work for clients who place their trust in us.

This position serves as the first point of contact for our clients and external partners, and therefore must possess a high level of mature professionalism, a warm demeanor, and be knowledgeable about our services. The Administrative Assistant/Client Relations Specialist must be very organized, accurate, and able to work both independently and as a team member.

The successful candidate will enjoy a flexible work environment with an emphasis on work/life balance, working with clients and co-workers who appreciate your commitment, and being part of a successful growing firm that keeps its priorities in the right place.

FIRM OVERVIEW

We are a successful, growing financial planning and investment management firm located in the university town of Davis, CA, just outside of Sacramento. We provide a unique work environment for team members who value doing the right thing while also balancing our personal needs outside of work. For more information about our firm, our approach, and our services, please visit our website at www.symphonyfp.com.

PRIMARY RESPONSIBILITIES INCLUDE:

RECEPTION AND ADMINISTRATIVE

- Answers the telephone, screens calls, takes messages, refers calls to appropriate team member, follows up to obtain client information.
- Schedules appointments and maintains office and planner calendars using our CRM system and Outlook.
- Greets clients upon arrival in a warm and professional manner and offers refreshments.
- Explains the firm's services and value proposition to prospective clients.
- Provides hospitality for clients and our team and ensures that our workplace is inviting, warm, and friendly.
- Opens, sorts, and distributes or follows-up on incoming correspondence, including faxes and emails. Prepares, memos, letters, and other documents. Maintains office supplies.
- Scans and names documents and organizes paper and electronic filing systems.
- Assists in maintaining client and marketing database.

QUALIFICATIONS

- AA degree or equivalent.
- Minimum two years customer service experience in professional setting.
- Able to multi-task in a busy office environment and handle various projects as needs and client requests arise.

- Very detail-oriented with the ability to adhere to rules and regulations of the financial industry and maintain high ethical standards and confidentiality at all times.
- Able to communicate professionally, clearly, and warmly in both verbal and written communication.
- Have knowledge of Internet software and be proficient in Microsoft Office Suite of products and Adobe Acrobat. Must be proficient in general Microsoft Windows navigation and file systems and able to learn customer relationship management programs such as Salesforce CRM. Current experience in Salesforce or similar programs is a plus.
- Have an awareness of basic cybersecurity practices and be capable of learning and practicing more robust cybersecurity measures on a daily basis.
- Knowledge of basic office equipment including: Internet and email, scan, copy and fax machines, and VoIP telephone.
- Dress appropriately in business attire for a workplace with frequent customer and professional interactions.
- Must be a self-starter and a problem solver with the ability to take initiative, no matter how big or small the task.

SALARY AND BENEFITS

- Competitive salary based on experience and qualifications with an opportunity to increase salary over time
- Paid holidays and vacation
- Benefits include subsidized Medical, Dental, Vision and Life Insurance
- 401(k) retirement and profit sharing plan
- Education and training opportunities

To apply for the position please send cover letter and resume to Matthew at matthew@symphonyfp.com

Selected candidate will be required to pass a drug test and background check. Symphony Financial Planning is an equal opportunity employer.