Career Opportunity

Symphony
FINANCIAL PLANNING

# ADMINISTRATIVE ASSISTANT

## THE OPPORTUNITY

The Administrative Assistant provides administrative support, client care and marketing in a financial planning setting. The position is critical to the success of our business and carrying out the promise of our value proposition. The ideal candidate will enjoy executing a variety of administrative, office and client relations duties.

This position serves as the first point of contact for our clients and external partners, and therefore must possess a high level of professionalism, a warm demeanor, and be knowledgeable about our services and processes. The Administrative Assistant 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: including, but not limited to, the following duties:

### ADMINISTRATIVE AND ACCOUNT SERVICES

- *Regular, predictable attendance is required.*
- Acts as main Receptionist to incoming clients, vendors, and other members of the public.
- Provides high-level administrative support by handling information requests and performing clerical functions.
- Answers incoming calls, screens, and directs as appropriate.
- Schedules appointments for Financial Planners
- Prepares reports, memos, letters, forms and other documents.
- Orders supplies and assists with managing office workflow and creating systems for success.
- Uses Customer Relationship Management (CRM) system to document every client interaction and follows up until task completion.
- Opens, sorts, and distributes incoming correspondence, including faxes and emails.
- Creates and maintains client paper and electronic files.
- Keeps handouts and all deliverables stocked.
- Gathers client documents, extracts data from source material and inputs data into our computer models.
- Drafts, coordinates, and follows through on any needed communication with new or existing clients.
- Maintains paperless office through data entry, scanning and document management system.

- Ensures invoices from vendors are promptly scanned and placed in appropriate files for payment.
- Ability to get along and work effectively with others

### CLIENT CARE AND SUPPORT

- Fulfills basic client service requests—communicates with clients via phone and email regarding administrative matters.
- Focuses on nurturing our existing client relationships.
- Maintains high ethical standards and confidentiality at all times.
- Greets clients upon arrival in a warm and professional manner
- Offers refreshments and provide each client with “white glove” service.

### MARKETING

- Executes mass mailings and assists in publishing the firm’s newsletters.
- Assists in maintaining referral networks with attorneys, insurance agents, accountants, and other financial professionals.
- Assists with preparing and printing marketing materials.

## QUALIFICATIONS

- AA degree or equivalent.
- Minimum two years customer service experience in professional setting
- Minimum two years’ experience implementing marketing strategies
- 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.
- 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.
- Knowledge of basic office equipment including: Internet and email, scan, copy and fax machines, and VoIP telephone. Other software and web-based programs used include Zoom, Skype, screen capture programs, Mail Chimp and Facebook
- 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.**