Company; Retirement Income Analyst

Job Description

Administrative Professional

Part Time 10:00-3:00 or 10:00- 4:00

The Administrative Professional is responsible for handling a variety of administrative support tasks in support of the Financial Advisor and colleagues including answering phone, receiving clients and visitors, data entry as well as preparing client reports, scheduling, and confirming client. Must be tech savvy.

Essential Job Duties & Responsibilities:

-Client Service
-Use excellent communication skills with staff, clients & Advisor
-Greet clients and visitors with a positive and helpful attitude
-Answer phones in a professional manner, as well as route calls as necessary
-Schedule and confirm client appointments by phone or email as well as maintain the company calendar
- Send client reports and Zoom links.
-Send approved client emails on behalf of Financial Advisor and check email system
-Sort & process mail
-Prepare client quarterly reports, including calling various companies to get updated information, as well as perform data entry to include entering new clients and maintaining current client records utilizing the client database system.
-Assist with a variety of administrative tasks including scanning and filing, as well as preparing monthly birthday and annual holiday cards
-Data entry of eMoney & Riskalyze (can be trained)
-Additional duties as needed in support of the organization

Preferred Education & Experience
AS Degree in Business or related field preferred
Prior experience in an administrative role (2 years)
Experience in financial environment (2 years preferred)
Combination of experience and education will be considered.

Must be able to pass a Fingerprint background check

Please email resume to info@retirewithria.com