

## **Executive Assistant to Financial Advisor and Team**

Focus Financial, Minneapolis, MN

### ***Position Description:***

Seeking full-time support for a Financial Advisor and his team who specialize in retirement and estate planning for high net worth clients. Main responsibilities will include managing day-to-day function of the office, scheduling, client meeting preparation and follow-up, database and document management, insurance processing, event planning and other projects as they arise. This position serves as a back-up to the practice manager who handles account maintenance, billing, IRA management and client relations.

### ***Major Responsibilities:***

- Client Communication – phone, email, newsletters and mailings
- Scheduling and Advisor Calendar Management
- Client Meeting Preparation and Follow Up – prepare agenda, statements, supporting documents and follow up with clients' post meeting
- Database Maintenance – update client records and data, distribution lists and forms
- Insurance Processing – prepare illustrations, proposals and applications, maintain submittal log until coverage is in place, work with clients to gather data and maintain files
- Client Appreciation Event Coordination – plan event details including venue, food and drink, entertainment, invitation and RSVPs, compliance follow-up and payment
- Daily/Monthly/Annual Tasks and Projects – email and mail management, compliance submissions, electronic file maintenance, manage office supplies, assist advisors and team as needed, tax season projects, holiday gift coordination

### ***Qualifications:***

- Minimum 5 years of office management
- Knowledge of the financial industry is preferred, but not required
- Excellent communication skills and customer service mentality
- Professional presence with ability to handle sensitive information confidentially
- Detail oriented with strong organizational skills
- Proficiency with Office 365 suite, CRM experience preferred, typing 60-70 WPM

To learn more about Focus Financial, please visit [focusfinancial.com](http://focusfinancial.com). Apply now by submitting your cover letter and resume to [careers@focusfinancial.com](mailto:careers@focusfinancial.com). Thank you for considering this position.