

Administrative Assistant

Focus Financial has an immediate opening for a **part-time Administrative Assistant** to work with an advisor's practice in Minneapolis, MN.

Responsibilities:

- Support staff to an advisor to include daily administrative duties such as:
 - Answer, coordinate and organize in bound client calls and maintain schedules
 - Meeting preparation and follow-up
 - Manage daily business and proactively monitor workflow to ensure accurate and timely completion
 - Database and file management
 - Compliance record keeping
 - Draft and edit correspondence
 - Organize team office and supplies, etc.

- Provide client service on behalf of the advisor that may include:
 - Respond to client inquiries and proactively reach out to clients for follow-up.
 - Responds to prospects request for more information.
 - Supports advisor's marketing activities as a delegate.

Requirements:

- Professional, articulate, and polished demeanor.
- Customer service experience.
- Able to manipulate data in a spreadsheet or database software program.
- Able to quickly learn rules and guidelines to comply with compliance requirements.
- Excellent oral and written communication skills.
- Able to establish and maintain cooperative working relationships.
- Self-directed, yet works well with and collaborates within a team.
- Process driven: able to assess a situation, provide a solution, and implement.
- Detail oriented, organized and ability to manage changing priorities.
- Appropriately handle confidential information.
- Familiar with Microsoft Word and Outlook, Microsoft Excel and Adobe Reader.
- Experience with a CRM database.

The best candidate for this position will have not only these requirements, but above all else, a strong work ethic, positive attitude, pleasant demeanor and outstanding interpersonal skills.

Preferred, but not required:

- 2-year degree
- Financial services industry experiences.
- Experience with Salesforce

Salary will be commensurate upon experience.

Send resumes to careers@focusfinancial.com with subject line: Client Service Assistant – Minneapolis