

## **SAX WEALTH ADVISORS, LLC**

### **Client Services Administrative Assistant**

A great opportunity for a career administrative assistant to work in the wealth management industry with a collaborative team. We are dedicated to providing an environment that offers stability and learning opportunities.

Our Mission is to help business owners and other high net worth individuals achieve their goals of accumulating, protecting and transferring wealth. We are searching for the perfect candidate to provide our clients with the highest level of personalized service.

#### **Job Responsibilities:**

A non-inclusive list of duties and responsibilities is outlined below.

- Process applications to open client accounts, process cashiering requests such as wires, EFTs and check requests
- Check daily trades to ensure accuracy
- Run financial reports from various software providers
- Prepare and review documents for the advisors
- Pre/Post meeting preparation including PowerPoint presentations
- Schedule appointments, draft correspondence and maintain confidential files
- Assist with monthly compliance maintenance
- Work closely with all team members and assist with daily activities and ongoing projects
- Implement a tracking system to monitor follow up with prospects – telephone calls, thank-you letters, etc.

#### **Qualifications:**

- Financial client service experience with 2-3 years of experience
- Proficient in Microsoft Office products
- Familiar with contact management programs as well as navigation of financial institutions websites
- Exceptional problem resolution skills
- Excellent relationship building skills – strong ability to anticipate and meet the client's needs
- Ability to multi task and prioritize with great attention to detail and accuracy
- Team player – must strive to be a collaborative, valued member of the team
- Ability to learn quickly
- Excellent organizational skills and efficiency is a must
- Capable of effective self-management

Must have valid driver's license and own vehicle for the occasional need to visit clients.

Please send your resume to Sharon Bleibtreu – [Sbleibtreu@saxllp.com](mailto:Sbleibtreu@saxllp.com)

SAX Wealth Advisors, LLC is an Equal Opportunity Employer