

We are seeking an Office Specialist to join our Austin Asset Family with at least 3-5 years' experience in a Wealth Management or financial services environment. The incumbent should have excellent skills and experience in communication, organization, Microsoft Office, time management, and detail oriented.

Office Specialist Responsibilities include:

- Provide high level customer service to clients
- Perform administrative functions, including answering phones, scheduling appointments, and providing world class customer service. Ability to handle various front office duties
- Demonstrate strong computer skills, Zoom and Teams video, advancing in use of our CRM system to include learning views created by others
- Demonstrate excellent written and verbal communication skills
- Picks up mail daily; logs in all client related mail; distributes mail to appropriate staff in a timely manner; logs in and mails outgoing client related mail and invoice payments, quarterly news letters; sends all company mail via most appropriate and economical vender
- Display out-of-the-box thinking for practical operation and service solutions that improve the client experience
- Demonstrate strong administrative skills including organizing, filing, and executing mailings, when requested
- Assist teams with pre-meeting set-up (conference room, phones, TV/Video), assist teams during client meetings, if needed; which may include, ordering of meals, set up for client working lunches, scan documents, and process docs for shredding
- Effectively manage time and workload with ability to prioritize effectively
- Welcome all customers with a warm, and inviting first impression, and serve as a bridge to the team for a successful meeting. Inform team of their arrival
- Demonstrate a clear understanding and adoption of the company's culture exemplifying the company's culture completely
- Serve as a Notary Public for clients
- Inventories office and kitchen supplies periodically; orders / purchases and stocks needed items

Special Duties:

Responsible for maintaining the front office including the lobby, kitchenette, and conference rooms, as well as, the community kitchen, appliances, and general office areas. Consistently keeping them clean, neat, and sanitized.

The individual should demonstrate the following:

1. Bachelor's degree or 5 years senior administrative related experience or equivalent combination, in a Wealth Management firm highly desired
2. Minimum of three (3) years' of customer service or related experience
3. Excellent telephone etiquette and guest relations skills required
4. Excellent verbal and written communications skills
5. Excellent customer service and customer retention skills. Thrive in a Serve First environment
6. High attention to detail and adaptable to working with structured teams.
7. Highly organized with excellent time management
8. Strong working knowledge of Microsoft Office suite (Excel, Outlook, Word, Zoom & Teams)
9. Comfortable and effective in a dynamic work environment, requiring high degrees of self-motivation and accountability
10. Ability to be in the office Monday – Friday, 8:30 am – 5:00pm (* hybrid schedule is not available for this position)

Benefits:

- 27 PTO Days
- 100% company paid benefits: medical, dental, vision, short and long term disability, life insurance (effective on the 1st of the month following hire date)
- HSA/FSA
- 401(k) Safe Harbor (Firm contributes 3% of your salary automatically)
- Paid Volunteer days (2)
- Company Volunteer events (2)
- Collaborative and fun culture
- Firm lunches monthly
- Great snacks and gourmet coffee
- Many more generous benefits

Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This position is on-site and in person.

Must be authorized to work in the United States.

Austin Asset is committed to offering a comprehensive benefits plan that is a part of total compensation. Benefits include health insurance, dental insurance, HSA/FSA reimbursement account, life insurance coverage, and a generous holiday and paid time off policy.

Austin Asset is an equal opportunity employer, committed to the strength of a diverse workforce.