

AUSTIN ASSET

POSITION DESCRIPTION: Office Coordinator

<u>POSITION TITLE:</u>	Office Coordinator
<u>REPORTS TO:</u>	Director, Finance & Operations
<u>SUPERVISES:</u>	None
<u>FLSA EXEMPTION STATUS:</u>	Exempt
<u>JOB GRADE:</u>	12
<u>NEW OR UPDATED:</u>	Updated
<u>LAST UPDATE:</u>	January 2, 2026

SUMMARY OF PURPOSE:

This person is responsible for supporting general operation activities including but not limited to; answering and directing telephone calls on a backup basis; greet and direct all clients and visitors; prepare correspondence and reports; assists partners and financial planners as requested; ensures efficiency of general office processes; assist in vendor maintenance/payments; assist in administrative HR tasks.

PHYSICAL/MENTAL REQUIREMENTS:

1. Uses personal computer approximately 6-7 hours per day.
2. Uses telephone and email to communicate with clients, vendors, approximately 3-4 hours per day.
3. Sits approximately 6-7 hours per day.
4. Bends, stoops and climbs to retrieve and store items (files, office supplies, etc.) weekly.

ESSENTIAL FUNCTIONS:

1. Learn types of accounts that clients may have, learn Austin Asset's methods for managing money and charging fees. **(PI)**
2. Demonstrate strong computer skills, introduction to scheduling software and CRM system that includes learning views, basic data entry, and documenting notes. **(PI)**
3. Demonstrate strong written and verbal communication skills; assisting clients as needed. **(PI)**
4. Coordinate vendor relationships including; timely payments, communication with vendors, ensure efficiencies relating to the operations of the firm. **(PI)**
5. Organize employee expense reports and perform monthly reconciliation of corporate credit cards. **(PI)**
6. Demonstrate strong administrative skills including organizing, filing, and executing mailings. **(PI)**

7. Exhibit time management skills and timely follow up with clients and team members; timely completion and follow through on projects, wrapping up loose ends. **(PI)**
8. Assist in administrative HR tasks including; scheduling of performance reviews, communication of deadlines to managers, non-confidential data entry. **(PI)**
9. Improve understanding of company services, how leads are processed, and handled within the firm and CRM; observe communication with leads.
10. Demonstrate a clear understanding and adoption of the company's culture; working with mentor to further refine and develop understanding.

POSITION REQUIREMENTS:

1. High School Degree. Some college preferred.
2. Minimum of three (3) years of position 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.
6. Strong working knowledge of Microsoft Office suite (Excel, Outlook, Word, Power Point, Teams).
7. Ability to achieve efficiencies in technology platforms the firm utilizes (CRM, Accounting Software, HR Information System)
8. Comfortable and effective in a dynamic, flexible work environment requiring high degrees of self-motivation and accountability.

The purpose of this position description is to serve as a general summary and overview of the major duties and responsibilities of the job. It is not intended to represent the entirety of the job nor is it intended to be all-inclusive. Therefore, the position may be required or requested to perform for Austin Asset other work duties not specifically listed herein.

Management reserves the right to modify, defer or rescind this position description at any time, with or without prior notice.

EMPLOYEE ACKNOWLEDGEMENT:

I acknowledge that I have received, read and understand this description of the major duties and responsibilities of my position. I also understand that the position description is not intended to be all-inclusive, and that I may be called upon to perform other duties during the course of my employment.

Employee Signature

Date

Original – Employee file
Copy - Employee