

Office Assistant in Lexington Center, Parking Provided

Summary: A flexible part-time position providing administrative support as well as general office oversight in a small, collaborative and caring financial advisory office of 3 – 4 people.

Principal responsibilities:

1. Ensure the overall office runs smoothly by ordering and maintain supplies
 2. Review and insure payment of regular office bills such as oil, phone/internet, etc.
 3. Execute client appreciation tasks such as sending thought items like flowers or ice cream, ordering customized presents, etc.
 4. Price comparison research and purchase of various items (office supplies, utilities, etc.)
 5. Scan and electronically file client statements, correspondence, forms and agreements within a paperless office
 6. Review mail and process or distribute accordingly
 7. Occasional travel research and reservations for advisor
 8. Schedule client meetings; follow-up with directions and confirmation
 9. Prepare and execute client mailings via post and email newsletter
 10. Use contract relationship management (CRM) system efficiently to track client-related items, documenting tasks and timelines clearly
 11. Make and implement suggestions to systematize and improve office function
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Required knowledge/skills/competencies:

- Prior experience in an administrative role or comparable
 - A conscientious nature and kind approach alongside a genuine desire to be helpful
 - Ability to work in a multi-tasking environment and accommodate shifting priorities as needed
 - Strong organizational skills and attention to detail
 - Ability to work independently and differentiate between matters that should be handled alone versus those that require assistance
 - Desire to improve our small office environment and its functionality; confidence to offer suggested improvements
 - Proficiency in using multiple technology platforms (e.g., MS Office, CRM System)
 - Appreciation of the synergy created while working independently as part of a team with shared business goals
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Compensation Structure: Hourly wage ranging from \$18 - \$23 / hr experience dependent

Comments: 15 - 20 regular hours per week. Assistant can set their own regular schedule during normal business hours as agreed upon with advisor. While regular hours are encouraged, there is flexibility to change hours within reason as circumstances arise. Accommodations can be made for school vacations or other such family obligations.

Inquiry or Application: Submitted to Laura Peeke at lpeeke@lifefirstfi.com