

JOB DESCRIPTION

Title: Administrative Assistant

Supervisor Title: Operations Manager

JOB SUMMARY

The Administrative Assistant works closely as a member of the Operations Team by providing professional and efficient support and service to Aspyre Wealth Partners clients and employees. The Administrative Assistant also maintains the office facilities.

JOB RESPONSIBILITIES

- Responsible for scheduling client meetings.
- Providing client service support, including conducting reminder calls, and tracking client preferences.
- Answering the general phone line and forwarding calls to necessary recipients
- Responsible for office facilities, furniture, and equipment, including purchasing and coordination with vendors.
- Providing general administrative duties for the office as assigned, including mail and package preparation and distribution, ordering office supplies and organization of the supply room, filing and organization of the file room, faxing, copying, and scanning projects, mass mailings, errands, and coordinating staff luncheons and refreshments.
- Assisting with marketing projects as assigned.
- Assisting with Business Development data entry.
- General data entry as assigned.
- Responsible for supporting the President of the company.
- Responsible for office housekeeping duties such as re-stocking the staff refrigerator, restocking the reception refreshment station, ensuring conference rooms are being maintained and communicating any issues with the building manager.

JOB REQUIREMENTS

Education: High School diploma or equivalent required. Associates Degree preferred.

Experience: Minimum of 5 years of work experience in an administrative role preferred.

Other: Excellent technical skills (administrative technology, MS Office, etc.), and excellent communication skills and client presence required. Ability to handle multiple tasks and prioritize daily activities. We are looking for a resourceful problem solver with a passion for Administrative Operations.