Legacy Wealth Management
Managing Generations of Wealth℠

1250 South Pine Island RoadSuite 350
Plantation, FL 33324
Office: 800-519-4015 | 954-474-7100
Facsimile: 954-474-7399www.lwmfl.com

Administrative Assistant/Client Service Associate

Job Description

Legacy Wealth Management is a boutique Wealth Management firm in Plantation, FL. Weare currently accepting applications for the position of Administrative Assistant for our Plantation location. For more information about us please see our website, lwmfl.com.

We are interested in individuals seeking a full-time Administrative Assistant role. Experience or interest in financial servicesis a helpful plus, though not required.

Job Description and Tasks

- Coordinates daily calendar and appointments for Managing Principal
- Helps Managing Principal research and prepare for meetings
- Makes travel arrangements for Managing Principal
- Manage expense reports for Managing Principal
- Takes detailed and concise notes for Investment Committee Meetings
- Acts as a point of contact between Managing Principal and clients
- Greets clients, guests and staff in a warm, sincere and upbeat manner
- Screens phone calls and routes callers to the appropriate party
- Schedules and confirms appointments for one or two financial advisors
- Enters data within a CRM database
- Opens, sorts and distributes incoming faxes and other correspondence
- Maintains polite and professional communication via phone, email, and mail
- Generates and prints reports, labels, envelopes, etc.
- Order office supplies and coordinate with third party vendors for office equipment maintenance
- Prepares mailings (monthly birthday mailing, and as needed)
- Completes office-related errands
- Operational duties as required

Skills and Desired Qualities

- Excellent attitude and extraordinary client service orientation with superior communication skills
- Strong written and verbal communication skills with attention to detail
- Strong calendar management skills
- Must be computer literate and proficient with Microsoft Windows, Word, and Excel
- Excellent organizational and time management skills
- Excellent note taking skills
- Ability to communicate clearly and effectively with third parties and vendors
- Ability to multitask, remain flexible and meet deadlines in a fast paced, quickly changing environment
- Work effectively and constructively both independently and within a team setting
- Pro-active approach to problem-solving with strong decision-making skills
- Proven experience in the financial services/wealth management profession preferred
- Proven experience as an executive assistant or other relevant administrative support experience preferredJob

Type: Full-Time- 40 Hours a Week

Contact: Please send a resume, cover letter, and references to Nuri Rubenstein at nr@lwmfl.com**. No phone calls,please.**

All offers for employment with Legacy Wealth Management, Inc. are contingent upon the candidate having successfully completed a criminal and personal background check. Relevant military experience is considered for veterans and transitioning service men and women. Legacy Wealth Management, Inc. is an Affirmative Action and Equal Opportunity Employer. All applicants will be considered for employment withoutattention to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran or disability status.