



CREATIVE PLANNING

Title: Administrative Assistant

Location: Overland Park, Kansas

Job Description: **JOB SUMMARY**

The primary responsibility of the administrative assistant is to increase the availability of the wealth manager, attorney or CPA by taking on all tasks that are not advice related.

The Administrative Assistant works under the Director of Administration. The Administrative Assistant performs a wide range of support activities to facilitate the efficient operation of Creative Planning's Leawood office. As part of the admin team, the Assistant supports both local and national wealth managers and their teams, and completes firm-wide projects and activities as requested.

JOB DUTIES

- Creates and sends marketing deliverables (client binders, marketing folders, prospect kits)
- Maintains supply of contents for marketing deliverables
- Scans and stores documents for client start meetings (or as requested)
- Enters new clients and qualified prospects into CRM database
- Assists with client/prospect travel to Kansas City; books hotel meeting space as needed
- Troubleshoots repair and replacement of company-issued equipment
- Assists with coordination of new wealth manager training sessions
- Ships in-house office supplies and replacements as needed
- Coordinates UPS shipping program including system updates and supplies inventory/ordering
- Completes a variety of special mailings
- Depending on wealth manager group assigned, completes occasional personal errands
- Coordinates national seminars for individual wealth managers; assists with firm-wide special event planning
- Assists in coordination of firm-wide community service projects (blood drives, Thanksgiving meal project, etc.)
- Provides Kansas notary public services for building staff
- Orders and maintains inventory of stationery items including business cards
- Orders referral and condolence gifts
- Provides front desk back-up for phone calls, desk coverage and client announcements

REQUIRED EXPERIENCE / QUALIFICATIONS

- High-level multi-tasker
- Excellent communication skills
- Efficient, extremely detail oriented and accurate
- Able to lift boxes up to 35 lbs

PREFERRED EXPERIENCE / QUALIFICATIONS

- 1 – 2 years administrative support experience
- Knowledge of standard office equipment operation

TECHNICAL SKILLS

- Microsoft Windows
- Database management
- Multi-line phone system