

Title: Administrative Assistant

Location: Minneapolis, MN

Job Description: **JOB SUMMARY**

The Administrative Assistant establishes and maintains a professional relationship with clients and is often the first point of contact for Creative Planning. The Assistant's responsibility is to increase the availability of the Wealth Managers and Financial Planners by taking on 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 Minneapolis 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

- Answers phones and greets clients/visitors
- Manages several calendars and makes appointments
- Distributes daily mail
- Creates and sends marketing deliverables (client binders, marketing folders)
- 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 the Salesforce database
- Assists with client/prospect travel to Kansas City; books hotel meeting space as needed
- Troubleshoots repair and replacement of company-issued equipment
- Requests 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 as needed
- Provides Minneapolis notary public services for building staff
- Orders and maintains inventory of stationery items including business cards
- Orders referral and condolence gifts
- Coordinates maintenance & repair of office equipment (copiers, fax, postage meter)
- All other duties as assigned

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