**Bare Wealth Advisors**

**Position Description**

**POSITION TITLE:** Administrative Assistant

**POSITION SUMMARY:**

The Administrative Assistant is an advisor focused position which provides key administrative and business support to an Advisor and is the initial point of contact for the advisor and client. The Administrative Assistant is an integral part of the Bare Wealth team and works with the Advisor and Client Service Associate to support the advisor in onboarding new clients, monitoring advisor email, preparing the advisor for client meetings as well as other various tasks.

**Responsibilities:**

* Schedule and confirm appointments, meetings, phone calls for Advisor.
* Prepare client preps for meetings.
* Schedule tentative annual review meetings.
* Copy review notes into Redtail CRM and send follow up email to clients.
* Set up and organize electronic client files.
* Onboard new clients by setting up CRM workflows, following up with clients, entering information into Redtail CRM, communicating with clients on outstanding items.
* Run reports as directed by Advisor.
* Order client gifts and prepare cards for special occasions.
* Scan documents for meetings.
* Assist Advisors with special projects as needed/requested.
* Assist with travel and booking accommodations.
* Draft correspondence as requested.
* Set up birthday tasks for new clients.

**REQUIREMENTS**

* At least 2 years of administrative experience recommended.
* Knowledge of office management systems and procedures.
* Excellent time management skills.
* Ability to handle frequent interruptions.
* Ability to prioritize tasks in order of importance and urgency.
* Attention to detail and problem-solving skills.
* College degree preferred, but not required.
* Industry experience preferred, but not required.

**EXPERIENCE AND SKILLS**

* General computer skills necessary.
* Excellent organizational skills.
* Excellent verbal and written communications.
* Excellent Microsoft Word and Outlook skills.
* Self-motivated with a desire to complete work with excellence.
* Strong interpersonal skills and ability to interact and make clients feel welcome and valued.

**BENEFITS**

* Health Insurance
* Dental Insurance
* Vision Insurance
* Short & long-term disability insurance, upon eligibility
* 401(k) plan, upon eligibility
* Vacation/holiday time

**ABOUT BARE WEALTH ADVISORS**

Bare Wealth Advisors is a financial planning and wealth management firm based in Gap, PA. We advise our clients to intentionally manage wealth in a way that aligns with their God-given purpose for maximum impact. Please visit us at www.barewealthadvisors.com to learn more about our firm.