

Administrative Assistant

Providing exceptional service to our clients starts with investing in exceptional people!

We are an independent wealth management firm committed to providing "Advice at a Higher Level" to our clients. A contributing factor to our success is a unique team structure. How do we build a successful team? We foster a culture of professional development, collaboration, and respect. We are passionate about what we do. We have fun, we work hard, and we are nice to each other. A successful team takes care of each other. This translates to a highly competitive Total Rewards package, including a generous benefits package and a paid time off policy that reflects our commitment to a healthy work-life balance.

The Administrative Assistant Role

The Administrative Assistant ("AA") performs duties which impact the client experience and support the day-to-day operations of CHP. The AA supports administrative functions for the firm, primarily reception duties, office administration, marketing support, information technology ("IT") support, maintaining a stocked and tidy kitchen area, and a myriad of client-facing tasks. This is a non-exempt, full-time position, reporting to the Office Manager.

Duties & Responsibilities

- Perform general reception duties, including answering incoming phone calls, greeting clients, processing incoming and outgoing mail, and preparing expense reports.
- Schedule and coordinate internal and external meetings.
- Manage the firm's general e-mail inbox; route and respond to emails as necessary. Archive A/P invoices and enter into CHP's accounting software. Ensure phone system functionality and act as liaison with external answering service.
- Work closely with the Office Manager to address user IT support issues including troubleshooting software application issues, managing computer hardware inventory, and acting as liaison with IT vendors to initiate and track Help Desk tickets for problem resolution.
- Maintain updates to CHP's website and social media accounts.
- Coordinate CHP events, including catering, party rentals, names tags, RSVPs and other related tasks as directed.
- Maintain office equipment and office supply inventory by taking inventory, placing orders and keeping supplies well-stocked and organized. Ensure office security through key and fob management.

- Perform client and prospect data entry and other account maintenance updates in the firm's CRM. Update compliance-related logs. Ensure data accuracy and integrity and keep records current on existing and prospective clients.
- Assist Office Manager with new hire onboarding and orientation.
- Digitize client and office documentation as needed to support the firm's paperless strategy.
- Prepare various deliverables which directly support client service and acquisition such as greeting letters, meeting packets, presentation books, service agreements and compliance materials.
- Coordinate on-going client retention activities including Birthday, Anniversary, and Thank You notes, flowers and gifts.
- Ensure kitchen area is kept clean, organized and stocked with beverages and snacks. Maintain common areas so that they are neat and portray a professional image.
- Prepare reports and other documents as requested.
- Assist with projects as assigned.

Professional Qualifications

- A minimum of two years of administrative experience in a professional setting. Expected to gain competency in industry terminology and concepts that support the job description.
- Undergraduate degree preferred.
- Proficiency in Microsoft Office Suite products required.
- Salesforce experience preferred, but not required.

Skills & Attributes

Confidentiality – Ability to maintain highly confidential information.

Collaboration – Highly collaborative and dedicated to continuous perfection of CHP's ability to deliver superior customer service to its clients.

Customer Service – Exceptional internal and external customer service skills. Ensures positive interactions through active listening and professional feedback.

Communication — Excellent oral and written communication skills. Projects a professional, capable image in both action and appearance.

Integrity – Exhibits a high level of integrity through interactions with internal and external customers. Goes above and beyond to do what is right for team members and clients.

Professionalism – Exhibits a professional and capable demeanor to clients and external affiliates. Represents CHP in a positive manner in all interactions with clients and affiliates.

Engagement – Contributes to the development of CHP through engagement and enthusiasm. Acts on the belief that every employee contributes to the success of CHP. Builds effective working relationships with colleagues.

Capacity – Strong time management skills, with an ability to effectively organize and prioritize tasks. Manages heavy, time-sensitive workloads, while maintaining accuracy through a strong attention to detail.

Judgment – Skilled problem-solving, particularly for obstacles in which the next course of action is unclear. Without hesitation, seeks guidance and direction when unsure of how to proceed.

Reliability – Understands and responds to the importance of being a dependable team member. Arrives to work on time, keeps calendar updated and communicates barriers with team members if tasks cannot be completed on time. Arriving to work on time and being physically present in the office during working hours is essential for this position.

We strongly urge people from unrepresented groups to apply.

Cable Hill Partners provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, sexual orientation, national origin, age, disability, or genetics. In addition to federal law requirements, Cable Hill Partners complies with applicable state and local laws governing nondiscrimination in employment. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and training.

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