

### **Administrative Assistant Position Description**

We are a leading fee-only financial planning firm in Ann Arbor, Michigan with a team of five CFPs, the most of any firm in the area. We are seeking an Administrative Assistant to join our growing team. This is an ideal opportunity for someone returning to the workforce or looking to change careers. This is a non-sales position that will work directly with the firm's owner and Senior Advisors in serving new and existing client relationships.

Key areas of responsibility:

- Maintain client records in CRM and document management software
- Interact with clients over the phone and in-person professionally and respectfully
- Facilitate efficient office operations including leading and assisting with process and system improvement projects
- Client Service: Opening accounts, processing client / advisor requests, preparing client paperwork, account maintenance and transfers.
- Answer phones: As needed.
- Update and maintain different pieces of software – client relationship management (Junxure), portfolio management (Portfolio Center), online client portal (Modest Spark), custodians (mainly Raymond James and Charles Schwab), etc.
- Compliance oriented tasks – Under the supervision of the Chief Compliance Officer.
- Vendor management – Suite management, tech vendors, phones, etc.
- VFS Social Events – Vintage typically has 2 client events per year.
- Labels - Creating/printing labels, cover letters, etc. for bulk mailings

Key Qualifications:

- Bachelor's or Associates degree preferred
- Show curiosity and confidence when dealing with clients and lead advisors
- Above average knowledge of Microsoft Office, especially Excel
- Specific industry experience preferred but not required.

Benefits:

- Competitive salary
- Company paid health insurance
- 401K plan with 3% employer match plus annual profit sharing contribution
- Parking permit
- Straightforward, professional and enjoyable work environment

Contact [Jack.McCloskey@VintageFS.com](mailto:Jack.McCloskey@VintageFS.com) with resume, cover letter or questions.