PASSAGE WEALTH™
Live your legacy.

Office Administrator

Organization Overview

Passage Wealth is an independent financial services practice located in Hoagland, IN. We are one of only ~25 practices nationwide to be part of the newly created Thrivent Advisor Network, a Registered Investment Advisor. This modern affiliation approach allows us the greatest flexibility to meet our client's needs. At Passage Wealth, we act as a reassuring guide, building authentic, faith-based relationships that help our clients open doors and unlock their financial potential. We take a broad-based approach to helping them achieve their financial goals by analyzing their current situation, developing in-depth financial programs, and helping them to implement an integrated financial strategy.

Position summary

This position plays an important role in serving our clients and successfully operating the practice in partnership with our Financial Advisors. A successful Office Administrator possesses strong written and verbal communication skills, builds strong relationships with their clients, has a friendly upbeat demeanor, and is motivated by the opportunity to make a difference in our clients' lives. This role would organize and manage a wide range of administrative and client support activities which include, but aren't limited to the following:

- Handle incoming telephone calls and respond to client requests for information
- Contact clients to set or confirm appointments
- Organize and maintain the financial advisors' schedule
- Update the client relationship management system with client data records and notes
- Assist Financial Advisors in the preparation and follow up for the client meetings
- Plan and prepare client marketing events
- Plan and prepare firm and client Charitable giving events
- Perform routine administrative duties such as maintaining office supplies and processing mail

Qualifications

- Exceptional client service focus and self-directed initiative
- Obtain your Life & Health Insurance license within 3 months of hire date with room to grow professionally if willing to obtain other licenses
- Efficient organization, planning, multitasking, and time management skills
- Ability to work effectively in a collaborative team environment
- Effective verbal and written communication
- Basic aptitude and knowledge of Windows based computer & Microsoft tools
- Ability to learn new tools and systems
- Ability to learn how financial services and markets operate
- Required to maintain integrity of sensitive & confidential information
- Flexibility to adjust to evolving client and practice needs
- Previous administrative/secretarial experience preferred but not required