

Office Manager/Client Reporting Coordinator

We are a small independent financial planning and accounting firm located in the Westport area looking for an Office Manager/Client Reporting Coordinator to handle all office management duties and client reporting administration.

Our firm provides financial planning, portfolio management and tax services to meet the various needs of our clients. As a client-oriented firm, we need an individual who recognizes the importance of providing outstanding client service. The coordinator will support the Owner/Certified Financial Planner® and other office staff.

Responsibilities:

Office Manager

- Answer incoming phone calls and schedule client appointments
- Greet clients, vendors, and visitors
- Interface with all office vendors for equipment and contracts
- Maintain office supplies
- Maintain paperless electronic record keeping system (Laserfiche)
- Assist with payroll
- Client year-end holiday cards and gifts
- Other miscellaneous duties as assigned

Client Reporting Coordinator

- Prepare quarterly client reports utilizing Advent/Axys software
- Maintain client bookkeeping utilizing QuickBooks and Quicken

Qualifications:

Must be able to function effectively both as a team player and independently.

Must be detail oriented and able to multi-task and prioritize time.

Exceptional communication skills

Experience with Advent/AXYS, Goldmine, Laserfiche, Quicken and QuickBooks preferred, but not required

Proficiency in MS Office

College degree or 5 years financial services experience

This is a full-time position that offers excellent benefits, salary commensurate with experience. Office hours are 8:30 am to 5:00 pm Monday through Thursday and 8:30 am to 3:00 pm on Friday.

Please send resume to kwilliams@wma-stl.com