

Administrative Assistant

Position Summary: The administrative assistant will be responsible for maintaining daily office functions, such as managing and maintaining CRM, filing client documents, inbound and outbound mail. The purpose of this position is to maximize office efficiency, allowing for further expansion. In order to be successful in this role you will need to work well with a team, be organized and detail oriented.

About Big Money Management: This company operates nationally and is growing by the day. Our vision is to help 1,000,000 clients, by providing them the best opportunities for growth, as well as educating them in the process. We work at a quickly evolving pace to ensure we are providing our clients with the best tools to be successful. Our core values are the backbone of our business and guide our hiring process: we are inspirational, accountable, transparent, disciplined, intentional, and results-oriented.

Performance Objectives:

- Maintain Client Files
- CRM Management
- In-Bound & Out-Bound Mail
- Deposit Checks
- Client Retention Calls
- Write client Birthday Cards
- Run Payroll
- Keep office supplies stocked
- Make Coffee
- Process reimbursement request forms

Capabilities/ Key Competencies:

- Clean and professional appearance
- Team oriented: Strong communication skills with team members are crucial
- Organized, accurate and timely completion of daily tasks
- Technical skills will be required for maintenance of CRM and working in G-Suite
- Enthusiastic and upbeat attitude when greeting walk in clients
- Neat and legible handwriting

Education & Experience:

- Associate degree
- 1 year of office experience

Physical Requirements:

- Prolonged periods sitting at a desk.
- This position could require travel -- up to 5%

Commitment to Diversity: As an equal opportunity employer committed to meeting the needs of a multigenerational and multicultural workforce Big Money Management recognizes that a diverse staff, reflective of our community, is an integral and welcome part of a successful and ethical business. We hire local talent at all levels regardless of race, color, religion, age, national origin, gender, gender identity, sexual orientation, or disability, and actively foster inclusion in all forms both within our company and across interactions with clients, candidates, and partners.

If this position caught your eye, send us your resume! For best consideration, include the job title and source where you found this position in the subject line of your email to **careers@bigmoneymanagement.com**. Already a Big Money candidate? Please connect directly with your recruiter to discuss this opportunity.