CARY STREET
PARTNERS

ADMINISTRATIVE ASSISTANT, ABINGDON

The Administrative Assistant will provide support and perform operational and administrative functions for the Wealth Management Group as a part-time employee. The Administrative Assistant must be flexible and possess excellent communication, organizational, and interpersonal skills to interact effectively with clients, co-workers and vendors. This position must also have the ability to prioritize various projects and take initiative on tasks in a small company environment. This is a part-time non-exempt position based in our Abingdon, VA office.

Position Responsibilities and Essential Job Duties

- Greet and direct clients and visitors.
- Answer and direct incoming phone calls.
- Provide administrative support to Financial Advisors and Client Service Associates.
- Perform routine clerical tasks; including managing email reports, data entry to spreadsheets, filing, and operation of basic office equipment.
- Prepare general correspondence, documentation, commentaries, memos, and reports and proofread for spelling, grammar, layout, accuracy and clarity of final copy.
- Maintain and update network and hard copy files including scanning of documents and cataloging folders.
- Maintain confidential and time sensitive material.
- Maintain records for compliance purposes.
- Prepare outgoing mail and packages for FedEx or US Post; maintain postage meter and sort, open, and distribute incoming mail.
- Coordinate and maintain conference room and other company calendars.
- Schedule and order lunches for presentation meetings, make necessary conference room preparations, and restore conference room to order.
- Initiate service calls for office equipment and building maintenance items.
- Manage inventory of office supplies and marketing materials.
- Manage special projects and other administrative and operational tasks as needed.

Professional Experience

- Proficient in software applications and programs including Microsoft Office Products – Excel, Word, and Outlook.
- 2+ years' administrative or related experience.
- Associate degree or two years' college preferred, but not required.
- Financial services industry experience is a plus.

Personal Attributes

- Ability to represent and serve as a positive and professional first impression of Cary Street Partners.
- Excellent organizational skills and ability to work effectively and independently on multiple projects with different associates in a fast-paced team environment.
- Excellent phone, interpersonal, verbal and written communication skills.

- Adaptability and resourcefulness in a dynamic, small business environment with ability to determine immediate and urgent needs.
- Ability to prioritize projects and manage and organize diverse workloads while maintaining exceptional attention to detail.
- Ability to learn new processes quickly.

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability or veteran status. Cary Street Partners participates in e-Verify and will submit your I-9 documentation to the federal government to confirm your legal eligibility to work in the United States.