

JOIN OUR TEAM!

We are growing and looking for teammates that value a cutting-edge entrepreneurial environment along with a strong team approach to getting the work done. Schechter is a 3rd generation financial advisory firm focused on Investments, Private Capital and Life Insurance for High Net Worth (HNW) clients. We are a curious, knowledgeable team that always strives to deliver the right strategy for the client.

We dig deep into the numbers, we vet, and research concepts and we deliver with the highest level of service. **It's who we are.**

OUR CORE VALUES



Clients' needs first



Create a complete "WOW" experience for clients and our staff



Cutting edge knowledge – we strive to be the experts



A special place to be

Watch
our
video



ADMINISTRATIVE ASSISTANT

JOB DESCRIPTION

The Administrative Assistant excels at organization, prioritization, and attention to detail. This individual will support multiple insurance/investment sales advisors to help them with scheduling, managing their pipelines and other administrative tasks. They are a key part to helping our advisors stay on track and excel. This individual should be able to work with a variety of different personalities to adapt to their specific needs. The administrative assistant needs to be able to work with little supervision and be able to anticipate and prioritize tasks. There is potential to learn and take on new and exciting tasks.

ESSENTIAL JOB FUNCTIONS

- Support multiple insurance/investment advisors
- Support Human Resources function (recruiting, onboarding processes)
- Schedule client and internal meetings
- Manage and maintain team schedules/calendars
- Make travel arrangements
- Input and maintain contact lists and opportunities pipeline in CRM system
- Compose general correspondence and emails when necessary
- Assist in preparation of presentation materials in electronic/paper formats
- Responsible for Schechter facilities
- Involvement on committees and other assignments within business as directed
- Various other duties as assigned by manager

EXPERIENCE

- Education: High School Diploma
- Experience: 2 years minimum as an administrative assistant

REQUIRED SKILLS

- Detailed oriented team player
- Strong organizational and time management skills. Must be able to establish priorities and execute them with minimal assistance
- Motivation and passion towards process improvement
- Strong computer skills, particularly with Microsoft Office - notably Excel, Word, PowerPoint, Outlook, Adobe Acrobat
- Exceptional written and verbal communication skills
- Enthusiasm –the company's culture is based on meeting the client's needs and exceeding their expectations
- Discretion/confidentiality a MUST in this position

OUR PROMISE TO YOU

- Opportunities to do exciting things and to learn
- Unique work environment with strong employee culture and values
- Competitive salary with Merit and Team Bonus eligibility
- High quality benefits including Medical, Dental, Vision, Disability, HSA, FSA, 401K, etc.
- Paid time off
- Flexible work from home policy

Please send your resume to careers@schechterwealth.com