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Position

Administrative Assistant / Receptionist – New Orleans Office

Company Profile

Southern Wealth Management, LLP is an investment advisory firm serving high net worth families and individuals. We were established in 2005 and are headquartered in San Antonio, Texas with additional offices located in Dallas and Midland, Texas and New Orleans, Louisiana.

Job Description

Our company is looking for an experienced **Administrative Assistant** able to provide services, such as process improvement, general office management, problem solving, scheduling, travel arrangements, calendar management, compliance support, equipment/technology set up, time and expense reports, meeting minutes, managing continuing education, data storage, etc. **Must be a professional who understands the responsibility of direct contact with clients and with sensitive and confidential data.** Excellent organizational skills and accuracy are important qualifications for this position. The ideal candidate for this position is a skilled multi-tasker, is reliable and is committed to consistently meeting deadlines.

Education & Experience Requirements

- Some college coursework in Accounting/Finance or commensurate work experience. A bachelors or associates degree in Accounting or Finance would be a plus.
- One (1) - Three (3) years' experience working in the business/finance industry or related marketplace is preferred.
- Proficiency in Microsoft Office suite (particularly Excel, Outlook, and Word), Adobe Acrobat, and similar software programs.
- Ability to work extensively with databases, spreadsheets, financial/legal documents, and files.

Job Responsibilities

- Greet clients promptly upon arrival.
- Operate telephone system to answer, screen, take messages, and forward calls, as necessary.
- Update client database using various systems and run new business status reports.
- Prepare, assembly and delivery of client/prospect documents, proposals, and policy binders.
- Generate weekly updates of administrative tasks requiring attention during subsequent one month, two month, and quarterly intervals.
- Provide support to operations in all client service and new business development areas.
- Scan/Copy and file documents and correspondences.



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Job Responsibilities (Cont.)

- Participate as a team member in special projects with a willingness to do whatever it takes to get the job done.
- Participate in industry meetings for continuing education and/or obtaining industry designations.
- Ability to design and implement new methods and procedures.
- Strong attention to detail with ability to organize, prioritize, and manage multiple tasks to achieve set deadlines.

Must have Attributes/Attitude/Aptitude

- Self-starter that desires to take initiative.
- Results and detailed oriented.
- Ability to work well on a team or autonomously.
- Excellent interpersonal skills.
- Strong verbal and written communication skills.

Physical Requirements

- Must be able to lift 25 lbs.
- Must be able to sit or stand for 8 – 10 hours.

I have read and understand the duties, responsibilities and qualifications of this position and acknowledge that I can perform the essential functions of the job with or without an accommodation. I also understand that this is a summary of this position's duties and other responsibilities may be assigned as the company deems necessary.

Southern Wealth Management, LLP is committed to hiring and retaining a talented diverse workforce. We are proud to be an Equal Opportunity / Affirmative Action Employer, making decisions without regard to race, gender, gender identity or expression, sexual orientations, national origins, disability status, age, marital status or protected veteran class.