



Receptionist:

Our financial firm in Sun City West, AZ is looking for a dedicated admin to handle client-facing duties at our front desk as well as general office tasks and general support to financial advisors and tax professionals. The administrative assistant is responsible for creating a warm and inviting environment for our clients and guests - this position is an integral part of our client experience. The ideal candidate would have a high level of attention to detail. Able to work with a team but also able to complete tasks independently, able to research tasks and reach out to outside resources as needed, has a willingness to adapt to an ever-evolving industry, and is dedicated to make a long-term career investment and grow with the firm.

Key responsibilities include, but are not limited to:

- Greet clients and guests making them feel welcomed into our office
- Answer phones and distribute calls to appropriate staff
- Maintain reception area and office to ensure neat and professional appearance
- Sort, open and distribute mail
- Restock reception area and office supplies
- Schedule client and staff meetings
- Scan in documents as needed for staff
- Assist with all staff members on various projects as assigned
- Timely and accurately maintain all documentation from the client into company systems.
- Develops working knowledge of any systems as they may be implemented and strives to improve current processes.

Qualifications and attributes:

- Exceptional customer service skills and professional phone manner
- Proficiency in Word, Excel, PowerPoint, Outlook
- Must be organized, detail-oriented and able to prioritize multiple tasks
- Has the desire to learn new things with a positive attitude
- Enjoys working in a fast paced environment
- Willingness and ability to learn and use new technology
- Excellent written and verbal communications skills
- Ability to take direction, ask appropriate questions and complete tasks independently
- Handles stress while operating with a sense of urgency and using good judgement
- Ability to effectively present information and respond to questions from managers, clients, customers and the general public.
- Ability to seek out solutions and solve problems