Job Opening:
Office Administrator

LifeTime Asset & Tax Management is a comprehensive wealth management service firm with a full-service tax department in our Raleigh headquarters. We are recruiting for a growth-oriented position.

This position offers exceptional career and advancement opportunities. Our firm will provide a friendly and supportive work environment with competitive compensation and benefits.

Base salary depends on education, experience, designations, and credentials; bonus packages are tied to individual and company performance; employees are supported with paid education opportunities to acquire or maintain licenses; additional benefits include paid medical, vision, dental, disability, and life insurance, 401(k) with an employer match, paid vacation and sick leave, and paid maternity/paternity leave.

Job responsibilities:

- Manage overall office space organization and appearance
- Answer phones in a professional and courteous manner
- Process mail and accept deliveries
- Greet clients in a friendly manner
- Prepare conference rooms for client meetings
- Manage client meeting calendar and conference room reservations
- Assist tax department with tax document collection and tax return packet distribution
- Package and mail client birthday cards and gifts
- Update client address & phone number changes in multiple systems
- Handle special projects as needed

Requisite qualifications:

- Associates or Bachelor's degree or equivalent experience in Office Administration

Required experience:

- 1-3 years' experience in office administration
- Sales experience and knowledge of the financial and tax industry a plus
- Strong social skills and the ability to deliver highly personalized service to each client
- Thrive in a compliance driven, dynamic and deadline driven environment
- Ability to think creatively and be comfortable making decisions
- Superior organization skills
- Proficient in MS Word, Excel and Power Point
- Experience with SalesForce CRM system a plus

Job Type: Full-time

Please email your resume, cover letter and compensation requirements for consideration to kim@lifetimeasset. EOE.

Benefits:

- 401(k)
- 401(k) matching
- Health insurance
- Dental insurance
- Vision insurance
- Disability insurance
- Life insurance
- Paid time off

Schedule:

- Monday to Friday

Supplemental pay types:

- Bonus pay

Education:

- Associates or Bachelor's (Preferred)

Experience:

- 1-3 years (Preferred)

Work Location:

- One location

Work Remotely:

- No

LifeTime Asset & Tax Management

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