



5250 Elvas Avenue
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www.soesbefinancial.com

Administrative Assistant

Description:

This is a full-time, permanent position (non-exempt) to provide administrative support to a busy financial planning and investment management services office. Duties include general administrative and receptionist tasks with additional responsibilities added as candidate grows into the position.

Who we are:

Soesbe Financial is a privately-owned boutique financial services company located in beautiful East Sacramento. Our passion is helping people improve their lives, and we are proud to be able to effectively serve our clients in this way by helping them to align their finances with their goals. We are an Equal Employment Opportunity Employer, and a woman-owned, Hispanic, LGBTQ and veteran-led company. Non-traditional and diversity candidates are encouraged to apply.

What you would be doing:

Providing administrative support to a busy financial planning office. Key responsibilities include:

- Create and maintain client files
- Scan and organize client documents
- Download and archive documents in client portal
- Collect needed documents from clients and follow up as required
- Prepare client agreements for signature (in-person or via DocuSign) and verify completion
- Answer phone, respond to prospect and client inquiries. Interact with clients who drop by
- Schedule and confirm meetings, send meeting reminders
- Send client portal access invitations and help clients with basic troubleshooting
- Update CRM with new client info and maintain CRM database
- Assist in meeting preparation and post-meeting follow-up
- Maintain tasks in CRM and assist planner with closing tasks
- Basic bookkeeping (match bank statements to invoices/receipts)
- Receive mail and packages and distribute
- Order supplies and keep supplies stocked and tidy
- Document processes and assist in improving efficiency of office procedures
- Be willing to work within the EOS framework and adhere to our core values and core focus

What we need from you:

- High school diploma, some college preferred
- Minimum two years related work in office environment
- Attention to detail with both written and numeric information
- Strong verbal and written communication
- Excellent phone skills; friendly, warm and professional on phone
- Ability to precisely follow written and verbal instructions and procedures in English
- Proficiency using Microsoft Office (Word, Excel) and ability to learn new technology quickly
- Able to work independently and in a small-office environment
- Strict adherence to company privacy policy and all other security procedures
- Mature, reliable, punctual, team player
- Interest in serving our niche clientele: older women and LGBTQ community
- Drug and background screening required upon acceptance of any offer and before beginning employment

What we offer you:

- Base starting hourly wage \$20 - \$23, depending on skills and experience
- Annual compensation review with inflation adjustment and performance-based raise
- As responsibilities grow, there will be a corresponding increase in compensation
- 10 days paid Personal Time Off annually (accrued each pay period)
- 10 paid holidays annually (New Year's, MLK Day, President's Day, Memorial Day, 4th of July, Labor Day, Thanksgiving, Friday after Thanksgiving, Christmas, Personal Holiday)
- Company-sponsored SEP IRA with 3% employer contribution after one-year employment
- Health insurance premium subsidy
- Relaxed attire (business casual when in-office client meetings)
- Supervisor with open-door policy and 360° reviews
- Occasional company-provided lunches (at office or off-site)
- Company-paid snacks & beverages
- On-site exercise room available (upon signing of waiver)
- Positive and encouraging work environment with awesome teammates!

Location:

Soesbe Financial, 5250 Elvas Ave, Sacramento, CA. Typical business hours (M-F, 9-6 with 1-hour lunch) *This position is not eligible for remote work.*

Soesbe Financial, LLC (CRD # 307384) is an independent full-service Registered Investment Adviser (RIA) and Certified Financial Planner® (CFP) firm. For more information on who we are, how we work with clients and additional positions, please visit our website at www.soesbefinancial.com/careers.

Please note that all pay and benefits may be modified at any time and are subject to company performance. California is an at-will employment state and employment may be terminated at the will of the employer or employee at any time. Soesbe Financial requires strict adherence to company confidentiality and security procedures at all times.