

Administrative Assistant

At Aladino Financial Services
(Mariner Advisor Network Affiliated Advisor Partner Firm)

Mariner Advisors Network is looking for an Administrative Assistant in El Dorado Hills, CA. This is a full-time opportunity open for a financial advisor company affiliated with Mariner Advisors Network. The Administrative Assistant will have a minimum of three years of experience providing administrative and/or operational support. The successful candidate will serve as the primary point of contact for clients in delivering exceptional personalized interaction and client-centric support.

Responsibilities

- Enhance client experiences focused on service: assisting new clients, maintaining client relationships, coordinating client needs along with team members.
- Personal interaction in front office welcoming clients and others, manage client communications via telephone and email, schedule and calendar appointments
- In conjunction with Financial Advisors, prepare client reports, portfolio performance presentations and coordinate ongoing activity
- Prepare transactional documents for Advisor review, finalize and submit for processing, follow-up to confirm for accuracy
- Upon Advisor instructions, execute trades and confirm accuracy
- Assist with client inquiries and projects, research and problem solve
- Maintain client electronic data and paper files in a timely manner
- Attend and participate in compliance and practice management learning opportunities
- Assist with routine office management and administrative duties
- Analyze and review activities within the job scope for accuracy controls and efficiencies, provide input to the team from your personal perspective for overall client service advancement
- Candidate will be committed to fulfilling all industry regulatory compliance standards and respectful of attorney-client ethics

Required Skills

- A minimum of three years of administrative experience supporting clients (investment professionals and small/mid-size firms preferred)
- High school diploma required, college preferred

- Strong verbal and written communication skills, some math skills
- Proficient in Microsoft Office programs, including Outlook, PowerPoint, Excel and Word (WordPerfect experience a plus)
- Knowledge of Fidelity/Schwab or similar custodial platforms a plus, knowledge of LPL or similar client portals an added plus