



Administrative Assistant

Review Services, Inc. is seeking an Administrative Assistant to work part-time (20-25 hours per week with the ability to be flexible with schedule at times) at an independent financial planning firm in Brookfield.

Key Responsibilities:

- **Customer Service:**
 - Create a positive first impression by answering phone calls and greeting clients in a professional and courteous manner.
 - Provide exceptional customer service by responding to client needs.
- **Meeting Preparation:**
 - Set up the conference room for in-person and virtual client meetings.
 - Generate reports and assist in preparation of appointment letters.
- **Daily Operations:**
 - Perform a variety of administrative tasks to support the day-to-day operations.
 - This includes scanning, client service, correspondence, and utilizing various software programs.
 - Enter held away account transactions in portfolio management system.
 - Cross train to provide backup assistance to other associates as needed.
 - Perform daily reconciliation of price and transaction downloads from custodian to client reporting database.
 - Service clients by opening new accounts, processing deposits/withdrawals, enter trades per Advisor's instructions, and other requests upon occurrence.
 - Additional responsibilities and tasks as assigned.

Required skills and experience:

- 3-5 years of administrative work, preferably in a wealth management environment.
- Strong business ethics and excellent work ethics.
- Excellent interpersonal skills with ability to relate with clients and business professionals.
- Superior organization skills and attention to detail.
- Strong written and verbal communication skills.
- Proficiency in Microsoft 365 applications (i.e. Word, Excel, Outlook, Teams, SharePoint).
- Ability to learn new software quickly and effectively.
- Ability to quickly grasp the financial industry regulations, office policies and procedures.
- Ability to work independently and proactively.

Please email your resume to Carrie at carrie@reviewservicesinc.com.