1364 South Atherton Street
State College, PA 16801
Email: jennifer@mcclarren.com

MCCLARREN FINANCIAL ADVISORS

Administrative Assistant
Job Description

Overview: The role of Administrative Assistant is to perform a variety of administrative and clerical tasks including support to our team and clients.

Qualities needed:

- Strong people skills
- Communicates effectively with others whether by phone, in person, or through email
- Detail oriented
- Organized
- Time management skills
- Polite and clear phone manners
- Ability to multi-task
- Positive attitude and sincere willingness to constantly learn and grow

Responsibilities will include but are not limited to the following:

- Front office reception – greet visitors/clients, provide service to clients.
- Answer, screen, and direct phone calls (including voicemails)
- Organize and schedule appointments including sending meeting reminders of what is needed
- Help maintain all common areas
- Order office supplies and research new dealers/suppliers if needed
- Write and distribute emails, correspondence memos, letters, faxes and forms when needed by the rest of the team.
- Maintain filing storage including cloud storage.
- Check trades weekly and maintain backup files for trades for compliance purposes
- During tax preparation season – scan documents, assemble incoming tax docs, explain signature pages to clients
- Print, assemble, maintain, and mail client brochures
- Print, assemble, maintain all office correspondence – letterhead, envelopes, labels and business cards
- Send birthday cards weekly and Christmas cards annually to clients
- Maintain, update and research ways to continuously improve Client Relationship Management (CRM) system
- Process incoming and outgoing USPS mail
- Adhere to our firm's compliance manual, privacy notices, and other rules and regulations as required by our firm and regulatory authorities.

Education and Experience Requirements:

- High School Degree or equivalent
- Proficiency with Microsoft Office suite, especially Excel is a must.

Benefits:

- SIMPLE IRA retirement plan with company match
- Paid vacation including having your birthday off!
- Competitive pay with year-end performance-based bonus. Initial compensation will be based on experience and qualifications of the specific candidate.
- Company paid short term disability. Employee paid long term disability is offered as well.
- Company holiday parties and team building events
- Working with a team of individuals that you like!
- Company paid parking

Those who should apply:

- Love people and want to help them.
- Enjoy learning
- Are professional but still enjoy a good laugh
- Want a career in finance and enjoy the subject matter.
- Want a long-term relationship with a company.
- Like Central PA – we want you for the long term, so you'll be living near State College, PA.
- Enjoy what you do and who you work with

Those who should pass:

- Must be micromanaged
- Are not excited by financial planning or the fee-only advisory firm.
- Afraid of change – we are constantly evolving, through technology or new processes.
- Not in it for the long-term – we are investing a lot of time and money into you, and we want you to stay with us for the long term.
- Do not want to do work that may seem "beneath you". We are a small firm – we need help from time to time with what may seem like mundane tasks.

What you can expect when applying:

- A response back that we are or are not interested at this time.
- If we are interested, we will proceed with a telephone interview
- If phone interview goes well, we will have a virtual interview.
- If the virtual interview goes well, then a final interview will follow where you meet with each of our team members in person following covid protocol.
- If that goes well, we will do background and credit checks.
- Formal written employment offer is then given to final candidate.

If interested, send a cover letter and resume to Jennifer Anderson jennifer@mcclarren.com.

No phone calls or drop ins please!