TACONIC ADVISORS INC

Poughkeepsie | Saugerties
(845) 486-5039

Administrative Assistant

Who We Are

Taconic Advisors, Inc. is a growing, fee only, comprehensive financial planning company located in New York's beautiful Hudson River Valley. We offer a team environment, a reputation for excellence and a continual focus on how to better serve our clients.

This is a part-time (est. 20-25 hrs per week) entry-level position that focuses on helping the Advisor and other staff in their work with clients. Strict confidentiality is required and a helpful, supportive attitude. You must be an independent and critical thinker, focused on meeting advisors' needs and making clients feel comfortable when visiting our offices.

Key Areas of Responsibility

Financial Planning and Client Service

- ✓ Set up and maintain client folders or binders (both hard copy and electronic)
- ✓ Communicate with clients regarding appointment scheduling and items needed for meetings
- ✓ Collect client data for meetings, scan and return original documents to the client
- ✓ Assist in preparing client meeting materials:
  - o Spreadsheet data entry
  - o Drafting of correspondence: letters, memos, etc.
  - o Preparation of financial forms (Inquiry access forms, transfer documents, etc.)
- ✓ Meeting follow-up:
  - o Scan final meeting materials
  - o Input action items into Junxure CRM; review One Note

Office Processes

- ✓ Input information into CRM (Junxure)
- ✓ Schedule and confirm client meetings as needed
- ✓ Prepare materials for client mailings:

ACP Alliance of Comprehensive Planners MEMBER

  - Newsletter preparation and delivery
  - Disclosure materials (Privacy Policy and Form ADV)
  - Other announcements and correspondence as directed by the owners
- ✓ Order supplies as needed for the office
- ✓ Review incoming mail and distribute
- ✓ Prepare deposits for the bank
- ✓ Assist with other events:
  - Annual Staff Retreat
  - Holiday Party
  - Other
- ✓ Make recommendations for improving workflows and firm systems

Qualification Requirements

- ✓ Bachelor's degree preferred
- ✓ Financial Industry experience preferred
- ✓ Strict confidentiality required
- ✓ Excellent written and verbal communication skills
- ✓ Experience working with Microsoft Office applications: Outlook, Excel, Word, etc.
- ✓ Possess a high degree of accuracy and attention to detail
- ✓ Ability to manage and process paperwork efficiently and accurately
- ✓ Warm, friendly personality with the ability to connect with people
- ✓ Willing attitude: "no job is beneath me," not a clock watcher
- ✓ Independent, autonomous with a "get it done" mindset

Benefits

- ✓ Competitive pay and incentive compensation
- ✓ Access to the company health plan
- ✓ Contributory 401k plan with employer contribution after first year
- ✓ A collaborative office culture with an emphasis on work/life balance
- ✓ Mentoring and learning opportunities to enhance your own career track

For consideration, please submit a resume and cover letter to:
Meredith W. Briggs, CFP® at mbriggs@taconicadvisors.com