525 W. Merrill St.
Birmingham, MI 48009
email info@motivewealth.com
www motivewealth.com

Position Description: Administrative Assistant

Motive Wealth:

Motive is a boutique wealth management firm serving a select group of families. We provide financial guidance and investment management within the context of long-term relationships. Ideal new clients have at least $10 million of investable assets and a minimum of $5 million with Motive to initiate an engagement.

Administrative Assistant:

To support our continued growth, we are adding an Administrative Assistant to the team. This is a support and operations role with limited client interaction.

How to Apply:

To apply, email your cover letter and resume to info@motivewealth.com. Your cover letter will be used to assess your written communication skills. Applications without a cover letter will not be considered. Tell us anything you think we should know about you and include a story, in your style, that reflects your personal definition of "great service." It can be something you did or something you experienced.

Key Responsibilities:

- Provide general support to advisors and client service team, including cashiering tasks and account administration
- Support the founders with a wide range of personal-assistant responsibilities — including scheduling personal appointments and handling one-off errands that help them stay focused on the firm's priorities
- Manage office operations: process mail, scan and organize documents, maintain supplies, and coordinate with vendors and property management
- Schedule client meetings, prepare reports, and coordinate associated logistics
- Maintain internal databases and organize digital file systems

Qualifications:

- Bachelor's degree preferred
- 1 year experience in a professional environment
- Professional presence across all settings—phone, Zoom, in-person, and written communication. Our clients expect capable, polished, and respectful interactions
- Proficiency in MS Office; experience with Tamarac, Charles Schwab, Fidelity, and/or Asana is a plus
- Must pass background, credit, and drug screening

Compensation & Benefits:

- This is a full-time position

525 W. Merrill St.
Birmingham, MI 48009
email info@motivewealth.com
www motivewealth.com

- Base salary: $50,000–$60,000 (commensurate with experience)
- Discretionary merit bonus
- Health & dental insurance
- 401(k) with 100% match up to 4%, vested immediately (available after 12 months).
- Hybrid work schedule (2–3 days in-office after training)
- 4 weeks of PTO annually, plus stock market holidays and additional time off around year-end holidays

Ideal Candidate:

- **Conscientious** – You take ownership of your work, follow through reliably, and care deeply about getting the details right
- **Self-Starter** – You are proactive, resourceful, and able to move tasks forward independently
- **Detail-Oriented** – You notice what others miss and understand that precision matters, especially in client-facing work
- **Warm and Professional** – You communicate with empathy and polish, whether by phone, email, or in person
- **Team-Oriented** – You collaborate naturally, share responsibility, and support others without hesitation
- **Organized** – You manage multiple tasks and timelines with clarity and calm
- **Discreet** – You understand the importance of confidentiality and handle sensitive information with care