



Concierge Service Support

Job Description

We're looking for an administrative pro who handles people and processes with ease. This person would have top notch Microsoft Office skills, loves organizing and projects, is a pit bull when it comes to follow through, and has an eye for detail. This person loves serving clients and people often comment on their warm and professional presence. We would like someone who has a ton of energy and enjoys a fast-paced environment.

About you

- You have super organizational ability and follow-through skills
- You love helping people
- You have the ability to anticipate and solve problems
- You have exceptional grammar skills
- You are detail-oriented and are a natural organizer
- You are experienced in Microsoft Office
- You are very well-spoken and professional in appearance
- You have a warm and professional demeanor
- You are an experienced user of a data base, contact management or Client Relationship Management program.

Responsibilities & Activities:

- Phone coverage support
- Manage daily operations of all aspects of service work processing, follow service deadlines and client ranking structure, utilize instructions, and meet or exceed client expectations.
- Assist with scheduling appointments for the office
- Become familiar with all forms and procedures.
- Assist with miscellaneous concierge duties, such as: address changes, daily alerts, weekly DocuSign sweeps, statement bundling, etc.
- Assist with money movement requests
- Create CRM notes & to-do activities
- Complete tasks within due date
- Schwab Alliance client contact
- Responsible for updating client binders
- Special projects assigned by the COO

How to Apply:

- Email resume, cover letter and personalized video as to why you'd be the best fit for this position to Tina Coquyt at Tina@sweetfinancial.com