

Title: Administrative Assistant

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The **Administrative Assistant** performs a wide range of support activities to facilitate the efficient operation of Creative Planning's Overland Park office. As part of the admin team, the Assistant supports both local and national wealth managers and their teams, and completes firm-wide projects and activities as requested.

#### **JOB DUTIES**

- Creates and sends marketing deliverables (client binders, marketing folders, prospect kits)
- Maintains supply of contents for marketing deliverables
- Scans and stores documents for client start meetings (or as requested)
- Enters new clients and qualified prospects into CRM database
- Assists with client/prospect travel to Kansas City; books hotel meeting space as needed
- Troubleshoots repair and replacement of company-issued equipment
- Assists with coordination of new wealth manager training sessions
- Ships in-house office supplies and replacements as needed
- Coordinates UPS shipping program including system updates and supplies inventory/ordering
- Completes a variety of special mailings
- Coordinates national seminars for individual wealth managers; assists with firm-wide special event planning
- Assists in coordination of firm-wide community service projects (blood drives, Thanksgiving meal project, etc.)
- Provides Kansas notary public services for building staff
- Coordinates maintenance and repair of office equipment (copiers, fax, postage meter, etc.)
- Orders and maintains inventory of stationery items including business cards
- Orders referral and condolence gifts
- Answers phones and directs calls; addresses questions using in-depth knowledge of company services
- Provides front desk back-up for desk coverage and client announcements
- All other duties as assigned

#### **REQUIRED EXPERIENCE / QUALIFICATIONS**

- High-level multi-tasker
- Excellent communication skills

- Efficient, extremely detail oriented and accurate
- Able to lift boxes up to 35 lbs.

#### **PREFERRED EXPERIENCE / QUALIFICATIONS**

- 1 – 2 years administrative support experience
- Knowledge of standard office equipment operation

#### **TECHNICAL SKILLS**

- MS Office/Windows
- Database management
- Multi-line phone system