CREATIVE PLANNING

Title: Administrative Assistant Floater

Location: Overland Park, Kansas

Job Description: **JOB SUMMARY**

The **Administrative Assistant Floater** establishes and maintains a professional relationship with clients and is often the first point of contact for Creative Planning. The floater rotates between the Mailroom and 3 different floors working the front desks. The floater performs a wide range of support activities to facilitate the efficient operation of Creative's Overland Park office and, as part of the administrative team, completes firm-wide projects and activities as requested.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly

JOB DUTIES

- Greets current and new clients, offers drinks and alerts appropriate staff member(s) promptly
- Assists as backup for the Mail Room or as a secondary person as needed in all duties revolving around the Mail Room
- Answers phones and directs calls; addresses questions using in-depth knowledge of company services
- Ensures knowledge of staff movements in and out of the building
- Schedules and confirms many types of appointments
- Creates and sends marketing deliverables (client binders, marketing folders, prospect kits)
- Scans and stores documents for client start meetings (or as requested)
- Enters new clients and qualified prospects into the database
- Orders referral and condolence gifts
- Reviews a large number of incoming faxes daily and distributes appropriately; most are business leads from company's main referral source
- Prepares outgoing FedEx and USPS shipments
- Schedules conference room spaces
- Assists with building maintenance coordination as needed
- Organizes storage room and maintains inventory count of in-house swag
- Makes coffee and stocks refrigerator with drinks for clients
- Keeps kitchen clean and organized
- Maintains ordering and delivery of office supplies
- Assists in coordination of office social events and catering (e.g., Friday BBQs, training lunches, etc.)
- Provides assistance with administrative support tasks as requested
- Required to work in HQ office
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Energetic, high-level multi-tasker
- Excellent communication skills
- Efficient, extremely detail oriented and accurate
- Able to lift boxes up to 35 lbs.

PREFERRED EXPERIENCE / QUALIFICATIONS

- 2 – 3 years reception/admin support experience
- Knowledge of standard office equipment operation
- Prior experience in financial services field

TECHNICAL SKILLS

- MS Office (mastery of Word, Outlook required; Excel experience a plus)
- Database management
- Multi-line phone system