

Title: Administrative Assistant & Mail Processing

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The **Administrative Assistant** is responsible for processing USPS, UPS and FedEx for multiple departments at Creative Planning. The Administrative Assistant may also perform 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.

JOB DUTIES

- Processes USPS, UPS and FedEx daily by:
 - Sorting all mail by department
 - Opening mail
 - Scanning to appropriate department/employee
 - Scanning & logging checks
 - Naming & saving scanned documents to client folders
 - Delivering mail to multiple floors & departments
- 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
- Prepares outgoing UPS and USPS shipments

- Assists in coordination of office social events and catering (e.g., Friday BBQs, training lunches, etc.)
- Provides assistance with administrative support tasks as requested
- 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