PRENTICE WEALTH MANAGEMENT

Position Title:	Executive Administrator
Company:	Prentice Wealth Management, LLC, 110 Linden Oaks, Suite F, Rochester, NY 14625
Job Type:	Full Time Employee
Experience:	5+ Years in Financial Client Service/Financial Administrative, Preferred
Education Level:	Associates Degree
Hours:	Monday-Friday 8:30am-5:00pm with some responsibilities outside normal office hours

Position Summary: The Executive Administrator will report directly to the Managing Partner. This position will be responsible for providing support to the Managing Partner and the PWM Leadership Team as well as providing services to the wealth management clients of the Managing Partner. This is a position for somebody with a can-do attitude, that is highly organized, and who wants to succeed by helping others succeed. The right person will be dedicated to building exceptional relationships, to continuous professional improvement, and to successfully completing tasks from start to finish. **If you're looking for a comfortable, predictable, and super-structured role, this position won't be the right fit for you**. Plainly - no two days are ever the same.

Position Responsibilities:

- Handle a broad variety of tasks to support the company's Managing Partner and leadership team, including:
  - Coordinate and manage the Leadership Team's calendars in Outlook and resolve schedule conflicts.
  - Meeting preparation (internal and external; including client meetings)
  - Keep meeting minutes and disburse in a timely manner.
  - External board support
  - Scheduling internal and external meetings
  - Plan and book travel (i.e., - flights, car rental, and hotel accommodations) for the Leadership Team.
  - Provide client service and support with a high level of professionalism.
  - Expense reporting
  - Personal errands as needed.
- Have an intimate knowledge of the Managing Partner/CEO's clients.
  - Provide clients with world-class support for their ongoing needs and service requests from start to finish.
  - Perform primary CSA functions for Managing Partner/CEO's clients.
- Support the Client Service Team duties, including but not limited to:
  - Greeting clients, answering and routing incoming calls, processing incoming & outgoing mail, scanning & faxing, preparing client reports.
  - Account Service Matters, at the direction of licensed staff such as opening new accounts, processing account transfers, updating account information, preparation of account service documents, executing money transfers, depositing checks/securities.
  - File Maintenance to include, updating and maintaining CRM system, creating/maintaining physical and virtual client files.
- Attend company sponsored events, provide event support including but not limited to booking space, printing/obtaining materials for the event, space set up and break down.

Candidate Qualifications and Attributes:

- Unwavering personal integrity.
- Professional attire and demeanor.
- A can-do and will-do attitude.

- Proficiency with Microsoft Office (Outlook, Teams, Word, & Excel), SharePoint, Zoom, and Adobe Acrobat.
- A desire for continuous personal and professional improvement.
- Ability to creatively multitask and manage conflicting demands.
- Excellent written and oral communication skills
- Ability to think critically, foresee issues and be able to escalate when needed.
- Dynamic, independent self-starter that can work independently and as part of a team.
- Ability to work with a diverse clientele.
- Proficient Analytical and organizational skills.
- All candidates must be eligible to work in the United States without sponsorship.