



Position Title: Administrative Assistant

About the Company

Cramer Capital Management is a firm made up of a dynamic team of financial advisors. For more than five generations, the mission of the Cramer family has been to provide safety and innovative financial security solutions to clients. Our independent firm takes pride in educating clients and their children on investing and protecting the financial legacies of families. The experience and services we provide go beyond just finances as our client care and communications are a vital part of our offering. We have created an environment that encourages all staff within the company to be involved in the client experience. Cramer Capital is committed to improving our clients, our employees, and our community. We believe in personal and professional growth while helping our team hone their craft.

Position Overview/Summary

The Administrative Assistant position is a critical role designed to support a wide range within [firm's] functions and individuals. The general duties of the role include clerical, receptionist, and project-based work. The role is also one in which the right candidate will feel comfortable stepping outside the traditional role description and provide support on an as-needed basis for critical firm initiatives, unforeseen firm opportunities and to leverage areas of specific candidate interest or expertise.

Position Responsibilities

- > Answer inbound phone and email inquiries and route to appropriate staff and team members; meet and greet clients and visitors to [firm's] office
- > Create and modify documents utilizing Microsoft Office including Word documents, Excel spreadsheets, PowerPoint presentations and databases
- > Type and word-process various documents and electronic information
- > Create financial and statistical tools and reports using spreadsheets
- > Manage, organize and update relevant data using database applications
- > Communicate and provide information by relevant methods internally and externally to assist and enable organizational operations and effective service to connecting groups

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- > Analyze and interpret financial statistics and other data and produce relevant reports
 - > Perform general clerical duties including but not limited to photocopying, faxing, mailing and shipping
 - > Maintain hard and soft copy filing system
 - > Work with firm principals or administrative office on acquisition, maintenance of office furniture, supplies, technology
 - > Coordinate and maintain records for staff office space, phones, parking, security, credit cards, travel and entertainment records
 - > Control and maintain PC inventory
 - > Support staff in assigned project work
 - > Assume other duties as required and assigned
 - > Coordinate new employee orientation
 - > Interpret instructions and issues arising, and then implement actions according to administrative policies and procedures
 - > Research and investigate information to enable strategic decision-making by others
 - > Arrange and participate in meetings, conferences and project team activities
 - > Approve decisions, requests, expenditure and recommendations on behalf of senior people in their absence, according to agreed guidelines and policies
 - > Adhere to stated policies and procedures relating to health and safety and quality management
- HUMAN CAPITAL MANAGEMENT TOOLBOX** The language outlined above is informational purposes only and not intended for the purpose of providing legal, regulatory compliance, tax or investment advice. You should contact your attorney or other professional service provider to obtain advice with respect to any particular issue or problem. Administrative Assistant

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> Adhere to procedures relating to the proper use and care of equipment and materials for which the role has responsibility

Required Skills and Experience

- > Knowledge of business and management principles involved in administration, resource allocation, human resources, leadership techniques and coordination of people and resources.
- > Clerical -- knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and other office procedures and terminology
- > Exceptional oral and written communication skills
- > Excellent follow-up and follow-through capabilities
- > Personable, approachable with a positive attitude
- > Organized, meticulous, detail-oriented and able to multitask
- > Able to interact well with all employees
- > Able to exercise good judgment by recognizing urgency and setting priorities
- > Professional attitude, demeanor, and appearance
- > Able to work independently with good problem solving and time management skills
- > High degree of confidentiality and latitude
- > Proficient with Windows based software, including MS Word, Excel, PowerPoint
- > Knowledge of [CRM system] a plus
- > Strong understanding of investment business/products/services
- > Five or more years of prior financial services industry experience preferred; investment advisory firm, brokerage firm or mutual fund company a plus
- > Knowledge of Microsoft Office and telephone protocol

Licenses

- > Educational and Professional Designations
- > BA/BS Degree from nationally recognized institution required

Firm Benefits

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