



## Part-Time Executive Assistant

Skylight Financial Group  
Toledo, OH, USA

\$17 to \$20 Hourly

Part-Time

### Why Work Here?

*"Rapidly growing and dynamic Financial Planning Firm with over 200+ financial planners and an opportunity for professional growth."*

### Job Description:

- Manage client files, contact information and multiple CRM databases
- Assist with the preparation and submission of all client paperwork
- Assist with the creation of investment proposals and insurance illustrations
- Track activity of client related processes and follow up on items until completion
- Assist the Advisor with administrative tasks related to new client acquisition
- Assist the Advisor with administrative tasks related to service meetings
- Follow up with financial planner on any pre or post client meeting items that are needed
- Manage CE and license renewals
- Will need to answer incoming phones calls and handle appropriately
- Will need to schedule and confirm client appointments
- Will assist the Advisor with calendar management
- Will greet clients for in-office meeting

### Skills:

- Prior Administrative Assistant experience required
- Exceptional communication and interpersonal skills
- Excellent organizational skills
- Skilled attention to detail

- Proficient with Microsoft Word, Excel and Outlook
- Ability to adapt to changes quickly
- Can work independently
- Capable of working through challenges effectively
- Ability to work on multiple projects and deadlines
- Dependable and punctual
- Prefer to have Life, Accident & Health and/or Series 6/7 licenses or Equivalent Experience in Financial Industry



### **About Skylight Financial Group:**

Skylight Financial Group is a state-wide multi-location financial planning firm. They are currently the largest independently owned financial planning firm in Ohio.

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Company website: <https://skylightfinancialgroup.com/>

Company address: 7150 West Central Ave. Toledo, OH 43617

Posted date: just now

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