**Tomczak – Executive Assistant**

**ZipRecruiter posting**

**Job Title:** Executive Assistant, in Toledo, OH

**Job Location:** Toledo, OH

**Job Category:** Admin/Secretarial

**Employment Type:** Full Time (approx. 40 hours per week)

**Job Description**:

* Manage client files, contact information and the CRM database
* 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

**Benefits:** (check boxes completed by Trisha)

**Compensation Range:**

**Starting –** $40,000

**Up to –** $42,000

Annually

**Street Address:** 7150 West Central Avenue, Toledo, OH 43617

**Skills:**

* Prefer to have Life, Accident & Health and/or Series 6/7 licenses (or willingness to obtain within 12 months of employment)
* 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

**Hiring Company:** Skylight Financial Group

**Why work at This Company:** Rapidly growing and dynamic Financial Planning Firm with over 200 financial planners and…

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