Client Concierge

The Client Concierge is responsible for coordinating and scheduling client meetings for the wealth management team. This position is the first point of contact for office visitors and incoming calls to the main line. Reporting to the Officer Manager, the Client Concierge will also provide various firm administrative support as needed. The Client Concierge is an introductory position for those looking to start a career in the wealth management industry. This role has the potential for a career path in the Firm Administration, Operations, or Wealth Management departments.

Why Willis Johnson & Associates?

Willis Johnson & Associates is a fast growing, award winning, wealth management firm specializing in corporate executives and professionals. We help our clients optimize everything in their personal financial lives from compensation and benefit strategy to tax mitigation, from retirement planning to investments. We also have an in-house CPA to provide tax preparation for our clients that need it. And with everything we recommend, we put our clients first—all the time, every time. No product sales. No commissions. Straight fee-only financial planning and asset management.

The same way we take care of our clients, we invest in our team. Aside from providing a very competitive benefits package including medical, dental, vision, disability/life insurance, 401(k), and PTO, we pride ourselves in supporting personal and professional growth. We encourage and incentivize continued education for all employees and support their participation in educational conferences and events. WJA is also proud to be one of the Best Places to Work for Financial Advisors by Investment News.

Essential Responsibilities

- Receive incoming calls and routes them to appropriate staff members.
- Schedule and confirm all client review meeting appointments.
- Ensure no conflicts on corporate calendar.
- Use CRM to update and log actions and workflows daily, noting progress of each action item.
- Ensure office is equipped to receive clients - lobby and conference rooms are presentable, and their refrigerators and room supplies are fully stocked.
- Receive clients and visitors. Greets and announces visitors, offers them a beverage upon arrival, validates their parking upon departure.
- Prepare firm's outgoing mail via USPS or Fedex and delivers to office building mailroom, checks inbound mail, daily
- Complete firm filing and scanning on behalf of advisors on an ongoing basis.
- Handle inventory of office supplies, and notify Office Manager when supplies are needed.
- Ensure all printers and copiers are in proper working order. Stocks each with paper, ink cartridges, and calls for service as needed.
- Monitor incoming faxes, logging and distributing faxes as received.
- Assist Office Manager with compliance functions, including monthly compliance audits and maintaining gift and incoming/outgoing mail log.
- Assists Office Manager and firm Officers with administrative support as needed.
- Personal assistant to President, including scheduling personal matters, organizing travel and itineraries, running errands, as needed.

Qualifications

- Bachelor's degree required.
- Previous calendar management experience required.
- 1-2 year's experience in office or administrative functions. Financial industry a plus.
- Strong technology and organizational skills. Experience with CRMs a plus.
- Exceptional interpersonal and communication skills.
- Confident, poised and professional in appearance.