



Position: Client Service & Marketing Associate/Office Manager

Location: Bellevue, WA

Company: Allison Spielman Advisors was founded 20 years ago by Thomas Allison. There are currently five employees, including three Certified Financial Planners®, one Financial Planner who is a CFP® candidate and one administrative staff. Allison Spielman Advisors offers two broad categories of services; Investment Management and Personal Financial Planning. Our financial planning process uses Money Quotient tools to assist us in getting to the heart of our clients' values and priorities and creates a framework that aligns their financial plan with their life goals. We love working together to help clients and we love what we do!

Position: As a small firm, all employees wear many hats. We utilize everyone's best skill sets to tackle responsibilities across functional areas. We are looking for a candidate who can manage day-to-day office and client service responsibilities but is also interested in learning about marketing (or has some prior knowledge/experience). This goal-oriented, self-motivated candidate should be familiar with client service, database management, office management and event planning. Experience with investment securities is desired but not required. Additionally, we are seeking an individual with a warm, professional, client-focused demeanor, strong verbal and written communication skills, attention to detail, ability to effectively prioritize and multi-task in a collaborative culture.

Principal Responsibilities:

Client service coordinator: Schedule client appointments, welcome clients before meetings, answer all client questions or requests (get assistance if needed), onboard new clients, scan client documents, create client forms (ex. setting up new accounts), execute securities trades

Office Manager: Enter and maintain information in client database, run reports (internal and external), maintain personnel files, maintain and file the firm's regulatory requirements, receive, sort and deliver mail and mail necessary documents

Marketing Associate: Plan and execute events, coordinate invites, assist with quarterly newsletters, enter and maintain information in constant contact, assist with website updates

Skills and knowledge required:

- Undergraduate degree.
- 4+ years of experience in an office management or related role.
- Strong PC skills with high-level proficiency in MS Word and Excel and CRM.
- Able to quickly learn new software.

- Strong attention to detail.
- Excellent communication skills.
- Personable/shows professionalism with clients and other professionals.
- Client data systems management.
- Strong organizational skills.
- Comfortable with numbers and spreadsheet data management.
- Event planning and implementing.
- Ability to multi-task.
- Has excellent follow-through and is committed to the end-result.

If interested, please email: jkirwin@allisonspielman.com