<u>Administrative Assistant for Sales - Job Description</u>

COMPANY BACKGROUND

Advanta IRA is a leading self-directed account administrator with over $2 billion in client assets under management. We act as a third-party administrator and recordkeeper for individuals that self-direct their retirement accounts by investing in alternative assets such as real estate, start-ups, and private placements. Advanta IRA delivers unparalleled one-on-one customer service, industry expertise, and educational tools that help ensure our clients' success.

POSITION BACKGROUND

Advanta IRA's objective is to continue to grow through the addition of new clients while maintaining low attrition of existing clients. This can be achieved by delivering exceptional customer service for existing and potential prospects, developing new lead sources, and building relationships with professionals (and professional organizations) throughout the community and beyond.

The Business Development Sales Support Specialist will work closely with all business development team members and support many of their daily functions.

SPECIFIC RESPONSIBILITIES

- Serve as primary administrative support for the sales team.
- Communicate with new clients to gather information necessary to open their accounts, facilitate the introduction to clients' account managers, and provide account opening and funding status updates to clients.
- Utilize Salesforce to enter new client account information and to establish new accounts, with special attention to accuracy and detail.
- Contact other retirement plan companies/custodians to follow up on the transfer of funds to new client accounts.
- Use Salesforce to prepare and review reports on new leads, new account status, and webinar attendees.
- Learn and understand the basics of company services and be able to communicate these services to potential clients.
- Demonstrate understanding of the essentials of self-directed IRAs, including account types, prohibited transactions, and potential investments.
- Move potential clients through the account opening and decision-making process by assisting them in completing forms, answering questions on potential investments, and involving other sales/marketing/transaction staff to handle more advanced issues that a potential client may have.

SKILLS, BACKGROUND & TALENTS REQUIRED

- Embrace and exhibit our core values—professionalism, integrity, proactivity, and eagerness.
- Have 1-2 years of administrative/sale support experience (preferred).
- Possess the ability to work with or without direction and multitask while paying very close attention to details.

- Excel at accomplishing tasks and following up with necessary parties (clients and team members).
- Be exceptionally well organized, analytical, and detail oriented.
- Be a quick learner who can grasp and retain tangible and intangible ideas rapidly.
- Utilize excellent verbal, written, and interpersonal communication skills.
- Show proficiency in MS Word, Excel, and Outlook.
- Familiarity with Salesforce is a plus.
- Maintain a professional appearance and demeanor.

LOCATION

- Largo, FL

COMPENSATION

- Full-time salaried position
- Health, dental, and vision insurance
- 401(k) plus company match
- Paid time off

PERKS

- We offer many perks like free chair massages, company lunches, a family atmosphere, fun team-building events, activities, and more.