

## **Receptionist/Administrative Assistant - Job description**

### **COMPANY BACKGROUND**

Advanta IRA is a leading self-directed account administrator with over \$2.5 billion in client assets under management. We act as a third-party administrator and recordkeeper for individuals who 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 through solid customer service, attention to detail, and following procedures. The person filling this position will learn about IRAs, specifically self-directed IRAs, to support and answer clients' questions. Advanta IRA provides in-depth training to help ensure successful onboarding.

The receptionist/administrative assistant provides professional, exceptional client service while performing various administrative duties. The successful candidate is self-driven, organized, proactive, eager, and excels at multitasking. Additionally, they employ exemplary telephone skills by presenting a quality image and treating the customer consistently, courteously, and efficiently.

### **RESPONSIBILITIES**

- Welcome and greet all visitors (in person or on the phone), answer their questions, or refer their inquiries to the right resource.
- Handle various administrative functions related to servicing existing clients—scanning and copying documents and assisting with incoming and outgoing mail.
- Assist clients with account-related paperwork to ensure efficiency and client satisfaction.
- Input client and transaction data into accounting and CRM Systems.
- Maintain appointment calendars and schedule meetings/appointments.
- Control company supply orders by maintaining stock logs.
- Maintain security by following procedures, monitoring the logbook, and maintaining our telecommunications system.
- Help devise more efficient and effective ways to perform administrative functions.

### **SKILLS, BACKGROUND & TALENTS REQUIRED**

- Embrace and exhibit our core values—professionalism, integrity, proactivity, and eagerness.
- Possess the ability to work with or without direction and multitask while paying very close attention to details.
- Be exceptionally well organized, analytical, and detail oriented.
- Excel at accomplishing tasks and following up with necessary parties (clients and team members)
- Utilize excellent verbal, written, and interpersonal communication skills.
- Show proficiency in MS Word, Excel, and Outlook.

- 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.