

## **Administrative Assistant**

**LOCATION:** Advanta IRA- Office in Largo, FL 33773

### **POSITION BACKGROUND**

The Administrative Assistant is responsible for providing exceptional receptionist services in a professional manner and performing various administrative duties. The successful candidate is self-driven, organized, proactive, and eager while having the ability to multitask and use exemplary telephone skills to present a quality image where the customer is treated in a consistent, courteous, and efficient manner.

### **JOB DUTIES**

As an Administrative Assistant, you will perform various administrative duties for the office, including:

- 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, including scanning and copying documents and assisting with incoming and outgoing mail.
- Assist clients with certain account-related paperwork to ensure efficiency and client satisfaction.
- Input client and transaction data into accounting and CRM Systems.
- Schedule company meetings and lunches.
- Manage company supply orders by maintaining stock logs.
- Maintain security by following procedures, monitoring the logbook, and maintaining the telecommunications system.
- Help devise better and more effective ways to perform administrative functions.

Advanta IRA provides thorough training and supervisory guidance to ensure successful onboarding.

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

- College degree preferred.
- Possess strong comprehension skills and the ability to work with or without direction and multitask while paying close attention to details.
- Be exceptionally well organized, analytical, and detail-oriented.
- Maintain a professional appearance and demeanor.
- Manage a high volume of calls and emails in a timely manner.
- 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.
- Embrace and exhibit our core values—professionalism, integrity, proactivity, and eagerness.
- Retirement plan and/or financial services experience is a plus.

## Employee Benefits Summary

- Compensation
  - Salaried position (anticipated \$38-40k, starting)
  - Annual reviews of performance and salary
  - Advancement Opportunities
- Multiple insurance options
  - Medical, dental, and vision
  - Telehealth
  - Prescription coverage
  - Options for Health Savings Accounts (HSA)
  - Individual and family plans available
- 401(k) after 6 months of employment
  - Up to a 4% company match
- Paid time off
  - No waiting period to begin accruing.
  - 9+ Federal Holiday in addition to PTO
- Additional perks include free chair massages weekly, company lunches, and fun team-building events on and off-site.

## COMPANY BACKGROUND

Since 2003, Advanta IRA has served clients nationwide to become a leading self-directed account administrator. Today, Advanta IRA manages nearly \$3 billion in client assets with the expectation of continuing to grow. 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, precious metals, and cryptocurrency. Advanta IRA delivers unparalleled one-on-one customer service, industry expertise, and educational tools that help ensure our clients' success.