NORTH STAR
Resource Group
Changing Lives, Forever®

North Star Resource Group Position Description

Position: Administrative Assistant

Reports to: Supervisor, Client and Customer Sales

FLSA Status: Non-Exempt

PURPOSE

To manage operations and marketing workflow of the Associate's Practice

ESSENTIAL FUNCTIONS

Administrative Assistant Tasks

Client Interaction / Correspondence:

- Answer phones
- Email or call clients to initiate or confirm investment transactions
- Prepare letters of instruction
- Handle basic service instructions from client meetings and phone calls
- Help maintain relationships with clients

Account Servicing:

- Confirm new business and received documents
- Prepare applications for investments and investment advisory accounts
- Prepare investment proposals and summaries for client meetings and advisor events
- Place Mutual Fund trades and liquidations

Administration / Record Keeping:

- Manage advisors' calendars
- Add important client notes to CRM system
- Assist in preparing paperwork, submit, track and record investment applications through the process to completion of funded accounts
- Prioritize investment instructions/applications (identify what parameters dictate high priority)
- Assist in completing applications (investment/permanent life insurance)
- Assist in preparing materials for Roth conversions, employer-sponsored plan rollovers, etc.
- Complete basic service work
- Keep team and advisor updated on where clients are in the new account opening process and issues
- Communicate account opening, online access and account funding to clients
- Follow up with clients on applications and forms that have been mailed or emailed
- Communicate with clients when accounts have not been funded and/or may close

REQUIRED SKILLS AND EXPERIENCE

Minimum requirements in terms of educational background, work experience, licenses /certifications or other knowledge, skills and abilities.

- Four-year degree or equivalent work experience
- Good computer skills
- Excellent verbal and written communication skills
- Good customer service skills
- Ability to maintain confidentiality of information
- Ability to coordinate multiple tasks and priorities
- High attention to detail
- Microsoft Word required

This description covers the primary and principal duties of the job. It is not intended to give all details or a step-by-step account of the way each procedure or task is performed.

ADDITIONAL SKILLS AND EXPERIENCE

- Good organizational and demonstrated problem solving skills a plus.
- Microsoft Excel and Outlook preferred
- Knowledge of insurance / financial services industry
- Life/Health licensing is a plus

Created By	Sources	Last Updated
Human Resources Manager	OMAT	March 2019