<u>Job Posting</u>

Overview

Investors Capital Management (ICM, Inc.) is a financial planning firm seeking a dedicated professional to serve as an Administrative Assistant. Based in our Hayden, Idaho office, this individual will engage directly with clients, manage essential administrative functions, and provide vital support to the broader team.

This position requires accurate data entry, correct preparation of financial materials, and agile administrative workflows. The core of this individual's strengths will include strong attention to detail, comfort with repetitive tasks, and the ability to support both existing client processes and emerging new business.

The ideal candidate possesses the "hospitality gene," excels at creative problem-solving, and takes pride in providing a seamless client experience. We believe that high quality relationships and exceptional service are what set us apart from others.

Key Responsibilities

1. Client Experience & Front Office

- The Warm Welcome: Serve as the first point of contact, greeting clients in person and via phone with a professional, welcoming demeanor.
- Meeting Coordination: Manage advisor calendars, schedule client reviews, and ensure meeting rooms are prepared (and stocked) for a premium experience.
- Communication: Handle incoming inquiries, filter requests, and ensure no client message goes unanswered.

2. Administrative Operations

- Onboarding Support: Assist in the preparation of new account paperwork and ensure all "Know Your Client" (KYC) documentation is accurate and filed.
- Data Management: Maintain our CRM (Redtail) with meticulous attention to detail.
- Process Improvement: Identify bottlenecks in our current workflows and suggest (or implement) more efficient ways to get the job done.

3. Team Support & Problem Solving

- The "Fixer": Troubleshoot administrative hurdles, from tracking down missing transfer assets to resolving technology glitches.
- Project Liaison: Support advisors by gathering data for financial plans and coordinating with external partners (CPAs, Attorneys, etc.).
- Compliance: Ensure all files and interactions meet industry regulatory standards.

Qualifications & Skills

- Experience: 2+ years in an administrative, client-facing role (Experience in financial services, accounting, bookkeeping, insurance, or banking is preferred).
- Willing to Grow: If not already attained, FPQP designation followed by SIE and Series 7 Licensing, expected to achieve within 1 years of employment. All education and licensing costs to be paid by ICM, Inc.
- Tech Savvy: Proficient in Microsoft 365 (Word, Excel, Outlook) and comfortable learning industry-specific software.
- Communication: Exceptional verbal and written skills. You can explain complex next steps to a client clearly and respectfully.
- The "Owners" Mindset: You don’t just wait for tasks; you look for what needs to be done. Must we willing to questions and seek support from the team.
- Education: Higher education or equivalent professional experience.

Benefits:

- Retirement and matching
- Hourly Position- 36hrs/wk
- Bonuses based on firm AUM growth and licensure
- Paid training and licensing

To excel in this role, we are looking for:

- Kind Demeanor: Project a pleasant and service-oriented demeanor in every interaction.

- Exceptional Communication: Showcase friendly and business-appropriate phone manners, communicating with clarity and professionalism.
- Organization: The demonstration of efficient skills in managing various responsibilities at once.
- Adaptability: Adapt to changing priorities and deadlines, ensuring a smooth workflow.
- Problem-Solving Skills: Demonstrate a quick learning ability, sense of urgency, and excellent problem-solving skills.
- Collaborative Spirit: Foster great relationships with co-workers, emphasizing collaboration and teamwork.
- Attention to Detail: Demonstrates rigorous quality control to ensure accuracy in all aspects of client interactions.

Day-to-Day tasks include:

- Greet clients and make them feel welcome both in-person and on the phone.
- Establish and maintain new and existing accounts.
- Process money distribution requests and checks for deposit.
- Work with the LPL back-office team to resolve various client problems.
- Organize data used for marketing.
- Work with our outside vendors to ensure smooth business operations.
- Keep records in good order for compliance purposes.
- Assist other team members, as needed.
- Ensure adequate office supplies.
- Other duties as assigned

Job Type: Full-time, 36 hours per week

Pay: $22 to $27 per hours, depending on experience and licensure

Work Location: In-person, Hayden Idaho Office

Interested Applicants submit resume to:

Brayden Jerde

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