

Front Office Specialist

Montgomery Taylor Wealth Management is seeking a Front Office Specialist to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

Become a member of one of the most respected teams in the wealth management industry. Montgomery Taylor Wealth Management was named one of the nation's top wealth management firms. The founder, Montgomery Taylor, is a best-selling author and speaker.

Our mission at Montgomery Taylor Wealth Management is to be the most trusted for financial advice. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

Description

The Front Office Specialist plays an important role in setting the tone for the organization. As the first and last person clients see when they are in the office, the Front Office Specialist is instrumental in making sure clients have a positive experience.

Responsibilities & Activities

- Greets clients and prospective clients in a friendly and sincere manner, making them feel comfortable when they visit the office.
- Handles incoming telephone calls; takes messages, check and update voicemail.
- Sorts and distributes the mail.
- Sends periodic client correspondence.
- Coordinates the assembly and mailing of client paperwork.
- Schedules appointment meetings as needed; Zoom, client drop off/pick up of documents, in person meetings, etc.
- Handles calendars for the Wealth Advisor(s) and others in the office.
- Develops, mails, and analyzes client satisfaction surveys.
- Develops and maintains written documentation (systems) of all activities.
- Draft our monthly newsletter.
- Maintain CRM database; Redtail.
- Manage our client gifting program.
- Assist with social media and marketing.
- Closing out completed tax returns.
- Restocks kitchen with provided supplies.
- Perform daily open and closing duties.
- IT troubleshooting and manage telephone system.
- Coordinate staff lunches as needed.
- Performs other duties as assigned.

Knowledge, Skills, & Abilities

- A genuine interest in serving and caring for other people.
- Excellent organizational and time management skills and ability to multi-task.

- Professional demeanor.
- Proficiency with Microsoft Office Suite.
- Formatting programs: Publisher experience, Adobe, etc.
- Ability to type 50 wpm.
- Attendance is an essential function.
- Salary is commensurate with experience.

We offer a flexible working environment in a beautiful and professional office location. This is your chance to play a key role in the path your career takes and in the continued success of our company. Our culture is fast-paced, collaborative, and focused on improving our client's lives.

For more information about our company, please visit our website www.MontgomeryTaylorWealth.com

If you're interested in this opportunity, please send your resume and letter of interest to Rachel@MontgomeryTaylorWealth.com. Given the high demand for this position, we're only able to contact the most qualified candidates.