

Position Description

Title: **Administrative Assistant**

Reports to: Office Manager

Benefits: Yes

Status: Full-Time

Date: Immediate

Job Summary

The Administrative Assistant performs an array of secretarial and clerical duties including directing inbound calls; scanning, filing, document organization; scheduling firm-wide meetings; facilities maintenance (e.g., photocopier/facsimile, supplies); business development event planning; supports firm leadership and management in implementing a pleasant office environment.

Duties and Responsibilities

The **Administrative Assistant** can expect to focus in the following areas:

- Screen & direct all inbound phone calls and take messages as needed; greet and accommodate guests
- Calendar management including scheduling and confirming client and staff meetings
- Scanning, filing, and document organization of all incoming documents including daily mail
- Follows processes & procedures related to client data gathering and document creation
- Manage all tasks pertaining to the office environment including tracking/ordering supplies, organizing company documents and maintaining office appearance
- Administers and prepares all out-bound mailings
- Supports business development in planning client firm events and preparing marketing materials
- Arrange travel schedule and reservations as needed
- Maintains continuing education for staff members, firm certifications and industry association memberships
- Multi-task, organize and complete all other projects as assigned by management

Qualifications

The **Administrative Assistant** position typically requires the following qualifications:

- Personable, warm, engaging; Client first attitude
- Minimum Associate's Degree
- Work experience that demonstrates people and teamwork skills
- Must be organized, meticulous, detail-oriented and able to multitask
- Proficiency with Word, Excel, and Outlook
- Excellent written and verbal communication skills
- Team player, able to work well with all levels of the firm, as well as with clients

- Adaptability and flexibility are required; ability to work under pressure and beyond standard hours during busy periods to meet tight deadlines

What We Offer

- Competitive salary commensurate with experience
- Performance-based discretionary bonus
- Safe Harbor 401(k) plan with discretionary profit sharing
- Medical, Dental, Long-Term and Group Life insurance
- Flexible Spending Account
- Paid vacation
- Opportunities for professional growth and continuing education

About the Firm

Modera Wealth Management, LLC is an independent, fee-only firm that provides clients with comprehensive financial planning and investment management. Modera has been featured in *Inc. Magazine* as one of America's fastest growing private companies for three years (2012, 2013 and 2015). The work culture of the firm promotes collaboration, professional growth, and a commitment to providing exceptional client service. This is a full-time position located in Westwood, NJ.

Please visit our website (www.moderawealth.com) to learn more about our firm.

Interested parties should email their resume to noemip@moderawealth.com.

NO PHONE CALLS PLEASE

Modera Wealth Management, LLC is an Equal Opportunity Employer