

Administrative Assistant- Financial Advisory Services

About Us

CPS Investment Advisors has a long history of building lasting relationships with clients. We work hard to earn their trust and confidence and consider many of them to be good friends and part of our “family”. Many of our client relationships have lasted more than thirty years, and we have often worked with multiple generations of family members and organizational leaders.

Essential Administrative Assistant (Financial Advisory Services) Functions

- Provides administrative support to Financial Advisors including scheduling meetings, preparing paperwork for meetings, creating meeting agendas, and preparing meeting notes.
- Performs general administrative duties such as filing, data entry, copying, binding, scanning etc.
- Communicates with clients/prospects via in-person meeting, telephone, and email in a professional, clear, and polite manner.
- Monitors advisor’s schedules, and anticipates and prepares necessary paperwork for upcoming appointments and events.
- Utilizes industry specific software to research and prepare reports for advisors.
- Completes special projects, as needed.

Education and Experience

- High School Diploma
- Relevant work experience, preferred.

Skills and Qualifications

- Strong proficiency with computers and Microsoft products
- Ability to prioritize and multi-task.
- Strong attention to detail.
- Ability to communicate effectively (oral and written), clearly articulating ideas, opinions, and information while utilizing proper spelling, grammar, and business etiquette.
- Understand the office environment and act/dress accordingly (see employee code of conduct)
- Strong organizational skills.
- Ability to manage deadlines and expectations efficiently.
- Ability to work in a team environment and independently.
- Ability to coordinate and collaborate with other staff to accomplish organizational goals.
- Proficient with Microsoft (MS) Windows and Office products, including but not limited to Outlook, Word, Excel, and PowerPoint.

Benefits

- Highlights include health insurance, paid vacation and sick time, paid holidays, and 401K match.
- CPS has a passion for community involvement. Opportunities to assist, donate, volunteer, and attend community functions.

Interested applicants can send their résumé and contact information to Stephanie Kimbrough at stephanie@cpsinvest.com.