

Office Coordinator / Client Service Associate

Full-Time Position

Location: Rhinelander, WI

Department: Client Service & Operations

Job Requirements:

- Associates degree preferred (or equivalent experience)
- Excellent oral, written, and interpersonal communication skills
- Computer skills: Typing, Microsoft Office, Client Relationship Manager (CRM), Adobe Creative Suite (InDesign, Illustrator, Photoshop, and Dreamweaver), and the ability to learn and adapt to changes in technology. Software specific training will be provided upon hire
- Ensures utmost confidentiality with respect to information pertaining to clients/potential clients

Job Description:

The Office Coordinator / Client Service Associate is an important part of the Operations and Client Service team. The Office Coordinator will be responsible for all day to day operations at both the Rhinelander and Milwaukee offices, while being located in the Rhinelander office.

These day to day functions will include:

- Answers phone and directs call to Advisors or staff
- Type letters - delivers to operations
- Meets and greets clients
- Handles all responsibilities of kitchen area
- Sets up appointments with clients
- Manages phone system
- Vendor management / tracks all supplies and orders paper, envelopes, other office essentials
- Maintain copy and printer machine
- Member of Heck Capital Business Committee & Office Committee
- Prepare meeting agendas
- Responsible for picking up, preparing and delivering mail
- May provide backup role for various marketing duties as needed

Job Responsibilities:

The Office Coordinator / Client Service Associate will coordinate various office tasks and functions to ensure office operations run smoothly at all times. Tasks include, but are not limited to, front desk management, answering phones and maintaining office supplies.

Additional responsibilities may include:

- Willingness to assist Advisors and Client Service team in all aspects of the firm

Benefits:

Insurance: Health Insurance, Dental Insurance, Vision Insurance

Leave & Holiday: Sick Leave, Paid Holidays, Paid Vacation

Retirement & Financial: 401(k) Plan, Profit Sharing