



Director of First Impressions, Receptionist, Personal Assistant

Description:

Position available for a mature, professional, caring, creative and patient person to join our independent financial planning firm in San Luis Obispo. The ideal candidate is friendly, energetic, positive, dependable and well organized. The position requires excellent interpersonal skills and phone demeanor with extraordinary client service attitude. Must also be very detailed oriented, technologically proficient and exceptional with multi-tasking. Must have excellent follow-through and be a self starter. This person will be a very visible member of the team and plays an important role in setting the tone for the organization. As the first person and last person clients see when they are in the office, the position is instrumental in making sure clients have a positive experience.

Responsibilities:

- Plans client events
- Implements Months of Welcome Program
- Delivers client “touches” and random acts of kindness
- Coordinates client newsletters & surveys
- Manages website and social media platforms
- Coordinates team events
- Greets clients visiting the office and provides refreshments
- Handles incoming calls and scheduling of appointments
- Picks-up daily lunches
- Re-orders office supplies
- Monitors advisor’s email and voicemail and prioritizes responses
- Keeps advisor on schedule - personal assistant
- Technology projects
- Has a Notary Public certification or the ability to obtain one upon hiring

Experience Preferred:

- Bachelor’s Degree
- Event planning
- Phone skills & customer service
- Social media, technology, and website management

Position is available immediately. Hours are Monday through Friday from 9am to 5pm (total 40 hours). Benefits include 401k matching, profit sharing, performance & task completion bonuses, and accrued time off. Salary commensurate with experience, education and skill set. Please send us your cover letter and resume to sarah.blackey@lpl.com.