Lanning financial inc

Part-time Virtual Assistant

Does this sound like you?

You've been called an executive assistant, but you see yourself as the crucial team member who keeps the leader sane and helps make the organization even more profitable. You represent the firm well, knowing that we are committed to being professional, providing an amazing customer experience, building the business through referrals, and taking security and privacy seriously. You're an organizational wizard who loves details and seeing projects through. You identify ways to save money and time, and you take pride in building systems to be more effective. Maybe you're a virtual assistant who wants a few more hours. Maybe you're looking for more flexibility in your work, or you want to be paid for the skills that make you such an awesome volunteer.

Independent financial planning firm looking for a part-time virtual executive assistant to support the firm's owner. You'll be expected to move quickly beyond performing assigned tasks to learning what tasks to take off the owner's desk proactively and serve the firm's bigger goals. This role starts with 5-10 hours per week and will grow over time. Pay is commensurate with experience.

You are someone who:

- Has a high EQ and is service-first.
- Has a strong command of written and spoken English.
- Is a self-starter and can work independently.
- Has sound judgment, discernment, and solid problem-solving and decision-making skills.
- Has strong attention to detail.
- Has respect for a variety of politics, religions, lifestyles and personalities.
- Will pass a background check and will take a Kolbe assessment.
- Is proficient with MS Office 365 and Sharepoint.

All the better if you:

- Have knowledge of the financial services industry and personal finance.
- Have experience with Salesforce, eMoney, QBO, Zoom, LinkedIn, Facebook, RIAinaBox, Nextiva, Adobe and Calendly.

Duties and responsibilities:

- Manage client requests and needs.
- Follow up and follow through with prospective clients.
- Prepare and process new and existing account paperwork.
- Manage advisor notifications.
- Manage projects.
- Manage the calendar and reserve office space if needed.
- Write blog posts and social media posts.
- Maintain client newsletter list.
- Manage client gifts .
- Filing.
- Maintain CRM data.

Please send an email to Jessica Lanning at jlanning@lanningfinancial.com. Please write a paragraph or so about why you would be perfect for this position and include a resume and/or a link to your LinkedIn profile.