



CREATIVE PLANNING

Title: Administrative Assistant/Experience Manager

Location: Newport Beach, CA

Job Description: **JOB SUMMARY**

Creative Planning is a leading retirement plan advisor to employers and employees nationwide providing fiduciary consulting, investment advice, compliance support, and employee financial education.

The Administrative Assistant/Experience Manager performs a wide range of support activities to facilitate the efficient operation of Creative Planning's Newport Beach office. As part of the administrative team, the Assistant supports both local and national institutional managers and their teams and completes firm-wide projects and activities as requested.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Creates and sends meeting deliverables (client binders, marketing folders, prospect kits)
- Maintains supply of contents for marketing deliverables
- Scans and stores documents for client start meetings (or as requested)
- Updates clients in CRM database
- Ships in-house office supplies and replacements as needed
- Completes a variety of special mailings
- Coordinates national seminars for individual wealth managers; assists with firm-wide special event planning
- Assists in coordination of firm-wide community service projects (blood drives, Thanksgiving meal project, etc.)
- Coordinates maintenance and repair of office equipment (copiers, fax, postage meter, etc.)
- Orders and maintains inventory of stationery items
- Answers phones and directs calls; addresses questions using in-depth knowledge of company services
- Provides front desk back-up for desk coverage and client announcements
- Required to work in Newport Beach office
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- High-level multi-tasker
- Excellent communication skills
- Efficient, extremely detail oriented and accurate
- Able to lift boxes up to 35 lbs.
- 1 – 2 years administrative support experience
- Knowledge of standard office equipment operation

TECHNICAL SKILLS

- MS Office/Windows
- Database management
- Multi-line phone system

Salary Range: \$22 - \$23/hour