

# Office Assistant

## JOB DESCRIPTION

### SUMMARY

Howe & Rusling is a Registered Investment Advisory and wealth management firm based in Rochester, NY with 94 years of experience and over \$1.7 billion in assets under management. While we ground ourselves in our long, rich history, the firm that exists today is one that continues to embrace the ever-evolving world around us. Our firm is owned and operated by its employees and is a proud veteran-owned and woman-owned business. Howe & Rusling strives to create and nurture a work environment that attracts the best talent and reflects our commitment to our clients, teammates, and community. And we're proud that as we've grown, our culture has remained centered around collaboration, camaraderie, and collective hard work for our clients and community.

Howe & Rusling is currently recruiting for an individual to join the client service team. We are looking for an individual who will help us grow and evolve our existing client service team. This individual should be passionate about helping clients and will be an essential member of the client's team. They will work with clients as well as assist as needed with prospective clients. This individual will act as the firm's office assistant and be responsible for handling a variety of clerical tasks in the office as well as handling incoming phone calls and other communications, greeting clients and visitors, managing files, updating paperwork and performing other general office clerk duties and errands as needed.

### RESPONSIBILITIES

- Provide exceptional proactive service to existing and prospective clients
- Collaborate with the service and planning teams on various projects and product offerings
- Participate in department/firm meetings, engaging colleagues across different areas, participate in working groups, sharing unique ideas, and participating in continuous mentoring
- Engage in ongoing client success
- Handle incoming calls and other communications including greeting clients and visitors as needed
- Managing filing system
- Updating paperwork, maintaining documents as needed as well as creating, maintaining, and entering information into databases
- Helping to organize and maintain office common areas including prepping conference rooms for client meetings
- Coordinating events and meetings as necessary
- Maintaining supply inventory and office equipment as needed

### REQUIREMENTS

- Passion for client services
- Familiarity with Microsoft Office365 is preferred
- Warm personality with exemplary written and oral communication skills
- Excellent interpersonal, planning, and organization skills
- Bachelor's degree preferred
- Notary public license preferred

### BENEFITS

- Medical, Dental, and Vision coverage
- 401(k)
- Attractive compensation package
- Education reimbursement for industry designation exams

### COMPENSATION

- Salary range: \$50,000 – \$70,000 per year
- Discretionary performance bonus of up to 10% of annual salary
- The salary range reflects the average range for this position. The actual salary offered within the range is dependent on a variety of factors including, but not limited to, qualifications, skills, performance expectations and relevant experience, education or training.



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