



Lumberton, NC
Administrative Assistant

- **\$16.50 per hour**
- **Part-Time 9 AM to 3 PM**

Job Summary: We are seeking a motivated and detail-oriented Administrative Assistant to provide comprehensive administrative and operational support to our Financial Advisors. The ideal candidate will have strong communication skills and a proactive approach to assist with client interaction, financial planning, and daily administrative functions.

Responsibilities:

Client Service:

- Act as the primary point of contact for clients via phone, email, and in-person.
- Schedule and confirm client meetings, ensuring all necessary paperwork is prepared and ready.
- Handle client service requests and resolve issues promptly and professionally.

Administrative Support:

- Maintain advisor calendars and manage correspondence.
- Prepare and review new client account and service paperwork.
- Manage office supplies, mail, and other general administrative tasks.
- Ensure all client information and files are accurate, organized, and confidential.

Financial Planning Support:

- Prepare client meeting materials, performance reports, and other financial documents.
- Assist in preparing draft financial plans and support efficient implementation.
- Perform market research as needed.

Qualifications:

- High school diploma or equivalent; Associate's or Bachelor's degree in a related field is a plus.
- Proven experience in an administrative, office support, or customer service role.
- Strong organizational and time-management skills with the ability to multitask.
- Exceptional attention to detail and accuracy.
- Proficiency in Microsoft Office Suite (Word, Excel, Outlook) and familiarity with client relationship management (CRM) software.
- Excellent verbal and written communication skills.
- Ability to handle confidential information with discretion.
- Proactive and able to work independently with minimal supervision.

Email resume to: info@aurorastrategicadvisors.com