Keener
FINANCIAL PLANNING

Plan to Live Well

Job Description
Administrative Assistant

Overview & Responsibilities

The Administrative Assistant's role is to assist the Operations team by providing client support for operational and administrative issues.

Responsibilities

- **Administrative duties:**
  - Scan materials, electronically file, shred, and manage the database
  - Ensure materials received by due date
  - Enter and print client invoices in accounting software
  - Enter payments into accounting software
  - Prepare new client packets
  - Open and sort mail, maintain office stamp supply, drop off mail including overnight packages
  - Maintain paper files – scan and shred as needed
  - Maintain reception area
  - Maintain list of supplies needed – coordinate with Director of Operations to order
  - Assemble materials for client meetings
  - Manage calendars
  - Prepare conference rooms for meetings
  - Complete reports as needed for weekly team meetings
  - Manage maintenance of general office equipment (copier, fax)
  - Perform other job-related duties or special projects as assigned

- **Client service:**
  - Answer and route phone calls
  - Maintain client information in financial planning software, accounting software, and scanning software
  - Manage business processes and tasks for clients
  - Set up conference calls via Zoom or other software
  - Manage meeting schedules
  - Greet visitors entering office
  - Send confirmation emails and make confirmation and courtesy reminder phone calls
  - Respond to client and vendor emails
  - Provide follow-up to clients regarding materials due, deposits, etc.
  - Send sympathy and get well cards to clients
  - Maintain client confidentiality in line with company's compliance procedures

Skills & Attitudes

- Strong computer skills including Microsoft Office, email, accounting software, scanning software, and other financial planning software
- Strong phone skills to answer and make calls on a daily basis.
- Friendly, confident, sincere approach to interpersonal relationships with high emotional intelligence.
- Solid written and verbal communication skills.
- Accuracy, speed, and attention to detail for record keeping and working with client data.
- Highest level of ethical responsibility and respect for client privacy.
- Quick learning skills for multiple technology and financial tools.
- Desire and ability to work independently and as part of a team.
- Commitment to core values of best interest of the client, respect, competence, professionalism, accessibility, and work-life balance.

About Keener Financial Planning

Keener Financial Planning is a fee-only financial planning and SEC-registered investment advisory firm with a primary office in Keller, TX and a satellite office in Dallas. As members of the Garrett Planning Network and NAPFA, our mission is to provide objective, expert financial advice tailored to each client's unique situation. With accessibility as one of our core values, services range from a la carte financial advice on an hourly or flat-fee basis to comprehensive financial planning and investment management.

We have a fun, supportive work environment. And yet, it's not easy. We work really hard to deliver an extremely high quality, consistent financial planning experience for each client. We served about 285 client households last year with a team of 9 people, so we have multiple deadlines and deliverables every single week.

We are a growing firm. We will continue providing highly personalized service while scaling our business model with efficient processes, smart use of technology, and extraordinary people.

We are an equal opportunity employer. We will extend equal opportunity to all individuals without regard to age, race, religion, color, sex, national origin, sexual orientation, disability, or any other status protected under applicable federal, state, or local laws.

Administrative Assistant Position Details

The ideal candidate will enthusiastically create a fantastic client and employee experience as a key part of the Operations team. Competitive salary based on skills and experience plus quarterly bonus potential. Company paid health, dental, vision, life insurance, and holidays. 100% 401(k) match up to 6% of pay. After 90 days, employees are also eligible for paid vacation time.

How to Apply

Send your resume and cover letter to Director of Operations, Kelli Hinton – kelli@keenerfinancial.com