Sample Job Description: Front Office Associate (Director of First Impressions)

*IMPORTANT: These job descriptions are samples only; customize each section to your firm and the specific role.*

**WHO WE ARE:**

{Company Name}, a growing wealth management firm, is seeking a Front Office Associate to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

*Insert here: any awards or accolades the firm or owner has received. For instance, “Become a member of one of the most respected teams in the wealth management industry. XYZ Wealth Management Group was recently named #25 on Registered Rep’s list of the Top 100 Advisors.”*

*Insert here: any unique aspects of your culture, such as company core values and how your culture looks in real life.*

Our mission at {Company Name} is to {Insert Company Mission Statement}. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

**WHO WE WANT:**

The Front Office Associate plays an important role in setting the tone for the organization. As the first and last person clients see when they are in the office, the Front Office Associate is instrumental in making sure clients have a positive experience.

**WHAT TO EXPECT:**

* Greets clients and prospective clients in a friendly and sincere manner, making them feel comfortable when they visit the office.
* Handles incoming telephone calls.
* Sorts and distributes the mail.
* Sends periodic client correspondence.
* Coordinates the assembly and mailing of client paperwork.
* Handles calendars for the Wealth Advisor(s) and others in the office.
* Orders and handles office supplies.
* Coordinates outside vendors.
* Develops, mails, and analyzes client satisfaction surveys.
* Develops and maintains written documentation (systems) of all activities.
* Writes down *6 Most Important* and prioritizes them each day before leaving office.
* Performs other duties as assigned.

**WHAT YOU NEED:**

* Excellent interpersonal skills.
* Excellent attitude and an extraordinary client service orientation.
* Superior phone skills—friendly and helpful in all interactions on the phone.
* A genuine interest in serving and caring for other people.
* Excellent organizational and time management skills and ability to multi-task.
* Professional demeanor.
* Proficiency with Microsoft Office Suite.
* Ability to type 50 wpm.
* Attendance is an essential function.
* Salary is commensurate with experience.

In exchange for your expertise, we offer a base salary, bonus potential, 401(k) plus matching, health benefits, a potential for career growth, and a great working environment. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational and focused on healthy living. Smokers need not apply. For more information about our company, please visit our website {Insert Company Website}.

If you’re interested in this opportunity, please send your resume and letter of interest to {Name and Email Address}.

We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status, or any other characteristic protected by law.