

MARKET STREET

WEALTH MANAGEMENT ADVISORS

OFFICE ADMINISTRATOR

FIRM OVERVIEW

When Market Street Wealth Management Advisors (Market Street) was founded in 2001, it was created with the guiding principle that its clients would be served in a way its own team and their family members would want to be treated. At Market Street, we've built a team with the best and brightest people to ensure we're on the forefront of market trends while providing sound financial planning recommendations to help our clients achieve their goals. Today, we continue to focus on providing an unmatched client experience through comprehensive financial planning, integrated investment management, and qualified retirement plan consulting services.

FIRM CONTACT INFORMATION

Market Street Wealth Management Advisors, LLC

3105 E 98th Street, Suite 170

Indianapolis, IN 46280

www.mswma.com

Phone: 317-552-0505

JOB SUMMARY

Does disorganization drive you absolutely mad? Do you enjoy expressing creativity in how you take care of others? Come and help us take care of clients by keeping our office on track and providing an engaging environment! Work with advisors who struggle to get in touch with their creative side and bring a little bit of your skillset to help us continue to treat our clients like family. We are looking for someone to help round out our team on the days that we are in-office as a part of our hybrid schedule. Share your energy with our growing firm and help to build a positive environment for our team and our clients.

This part-time role will require you to work from our Carmel, Indiana office two days per week (currently Tuesdays and Wednesdays). If additional hours are needed, work may be done from your home office. Working in the office, you will assist our clients, prospective clients, and other guests through providing a warm and welcoming experience when visiting our office. Continuing great service you will assist our team members through preparing meeting spaces,

keeping common areas neat and tidy, ordering office supplies, manage incoming and outgoing mailings, and assisting with celebrating our team through coordination of firm events. We anticipate this position will average 15 – 20 hours per week.

DUTIES AND RESPONSIBILITIES

- Assist with preparing and mailing client billing invoices and preparation of client quarterly reports.
- Open, scan, and file incoming mail.
- Greet clients and visitors, make them feel welcome and comfortable while waiting.
- Assist in purchasing and stocking office equipment, supplies, and client materials.
- Screen and route telephone calls.
- Keep reception, kitchen, conference rooms, and other public areas neat and tidy.
- Prepare meeting spaces, coordinate catering, and maintain the calendars for conference rooms.
- Attend Market Street Team meetings.
- Coordinate our weekly all team lunches.
- Plan and execute our team celebration events and holiday party.
- Assist with any special projects.

QUALIFICATIONS

An ideal candidate would possess the following minimum qualifications:

- Minimum high school diploma.
- Proficiency with Microsoft Office Word and Outlook.
- Warm and friendly personality with the ability to connect with people both in person and over the phone.
- Desire to WOW others with their service.
- Ability to multi-task, manage time effectively, and work unsupervised.
- Ability to maintain absolute confidentiality in dealing with client matters.
- Extremely proactive, passionate, and determined to continually learn.
- Professional demeanor, team player, excellent people skills.
- Desire to work successfully in a small company environment.

COMPENSATION AND BENEFITS

Compensation and Benefits are competitive based on industry standards.

- Compensation will be based on relevant experience.
- Annual Bonus Plan based on individual and firm performance.
- Benefits include a 401(k) plan with generous company contributions and paid vacation.

Application Process

To apply for this position:

- Submit your resume to Aaron Williams AaronW@mswma.com
- If you are selected from our resume review, you will be contacted to begin the in-person interview process.

**Market Street Wealth Management Advisors, LLC is an Equal
Opportunity Employer**