



**GEORGETOWN  
FINANCIAL GROUP, INC.**  
Helping to fund the future.

## **Position Title: Administrative Assistant**

### **About Georgetown Financial Group, Inc.**

Since 1981, Georgetown Financial Group (GFG) has grown into a distinguished national full service financial services company with approximately 100 financial advisors at Cetera Advisor Networks LLC.

As an independently managed producer group, GFG's advisors provide financial planning and wealth management services, designing and implementing detailed strategies to help our clients accumulate, protect, and transfer wealth. Integrity, leadership and compassion for helping clients is what drives our financial advisors each day.

### **Position Overview/Summary**

The Administrative Assistant position is a critical role designed to support a wide range of functions. The general duties of the role include clerical, receptionist and project-based work. The role is also one in which the right candidate will feel comfortable stepping outside the traditional role description providing support on an as-needed basis for critical firm initiatives, unforeseen firm opportunities and to leverage areas of specific candidate interest or expertise.

### **Position Responsibilities**

- Answer inbound phone and email inquiries as well as meet and greet clients and visitors
- Create and modify documents utilizing Microsoft Office including Word documents, Excel spreadsheets, PowerPoint presentations and databases
- Prepare necessary documents for meetings
- Create financial and statistical tools and reports using spreadsheets
- Manage, organize and update relevant data using database applications
- Communicate and provide information by relevant methods internally and externally to assist and enable organizational operations and effective service to connecting groups
- Analyze and interpret financial statistics and other data and produce relevant reports
- Perform general clerical duties including but not limited to photocopying, faxing, mailing and shipping
- Maintain hard and soft copy filing system
- Work with firm principals or administrative office on acquisition, maintenance of office furniture, supplies, technology
- Coordinate and maintain records for staff office space, phones, parking, security, credit cards, travel and entertainment records
- Support staff in assigned project work
- Assume other duties as required and assigned
- Interpret instructions and issues arising, and then implement actions according to administrative policies and procedures
- Research and investigate information to enable strategic decision-making by others
- Arrange and participate in meetings, conferences and project team activities
- Approve decisions, requests, expenditure and recommendations on behalf of senior

- people in their absence, according to agreed guidelines and policies
- Adhere to stated policies and procedures relating to health and safety and quality management
- Adhere to procedures relating to the proper use and care of equipment and materials for which the role has responsibility

### **Required Skills and Experience**

- Knowledge of business and management principles involved in administration, resource allocation, human resources, leadership techniques and coordination of people and resources.
- Clerical -- knowledge of administrative and clerical procedures and systems such as MS Office, managing files and records, client meeting preparation, and other office procedures and terminology
- Exceptional oral and written communication skills
- Excellent follow-up and follow-through capabilities
- Personable, approachable with a positive attitude
- Organized, meticulous, detail-oriented and able to multitask
- Able to interact well with all employees
- Able to exercise good judgment by recognizing urgency and setting priorities
- Professional attitude, demeanor, and appearance
- Able to work independently with good problem solving and time management skills
- High degree of confidentiality and latitude
- Proficient with Windows based software, including MS Word, Excel, PowerPoint
- Knowledge of Redtail or Smart Office a plus
- Strong understanding of investment business/products/services
- Five or more years of prior financial services industry experience preferred; investment advisory firm, brokerage firm or mutual fund company a plus

### **Requirements**

- Previous experience necessary
- Knowledge of financial services or related industry preferred