



Job Posting: Office Administrator

Pathfinder Wealth Consulting, an established and fast-growing wealth management firm, is hiring an Office Administrator (OA) to make a great first impression on clients, prospects, and partners. Our firm requires a dynamic team player that can excel at multiple roles and handle both professional and administrative tasks with effectiveness and a great attitude.

The OA position is perfect for an individual who is energetic and organized, and is looking to work for a fun, growing company. This is a job for someone who seeks work-life balance and enjoys a blend of teamwork, organization, client interaction, and self-directed tasks.

We are looking for an Office Administrator who is quick-thinking, responsible, dedicated, and willing to work hard while developing new skills.

The OA assists the Client Services Manager and Marketing Director and acts as general office support for all team members, including a broad range of tasks. Our firm has offices located in Wilmington, NC and Cary, NC. This position will be on-site in our Wilmington office.

Principal responsibilities:

- Perform administrative duties at office reception front desk, including greeting clients before client meetings, and assisting the needs of pop-in clients and vendors.
- Answer phones, gauge client needs, and transfer to, or take message for, appropriate team member, as well as monitor voicemails.
- Manage digital files.
- Schedule client meetings with Calendly and Outlook.
- Open and distribute daily mail delivery, manage postage system, and prep outgoing mail.
- Conduct general office maintenance, such as ordering supplies, office equipment, etc.
- Assume the role of technology point person; work with external support to troubleshoot issues and maintain relationships with tech support vendors.
- Ensure a professional and inviting office environment, including general tidying, maintaining coffee bar, etc.
- Assist with client event coordination.
- Assist with client experience campaigns.
- Assist Client Services Manager and Marketing Director in other tasks as assigned.

Required knowledge/skills/competencies:

- Bachelor's degree, or equivalent.
- 2 years of experience managing office operations.
- Outstanding customer service orientation; polished, poised, professional demeanor; energetic and welcoming, easily establishes rapport with clients, vendors, and prospects.
- Tech-savvy with the ability to master new systems quickly.
- Able to stay focused and self-directed and maintain a high degree of accuracy and efficiency while task-shifting.
- Strong written and verbal communication skills.
- Certified notary preferred.
- Financial services/banking/insurance experience a plus.

To apply, please email your resume to careers@pathfinderwc.com.

Pathfinder Wealth Consulting

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