

GOLSAN SCRUGGS

ADMINISTRATIVE ASSISTANT

Reports To: Chief Operating Officer
Supervises: None
Status: Full-Time or Part-Time (Depending)

General Job Description: Provide administrative general accounting, operations, and marketing support.

Essential Functions:

Provide administrative assistance

- Perform general bookkeeping and accounting duties.
- Manage business transactional filings.
- File paperwork to respective client and company files.
- Scan documents into agency management system.
- Reconcile agency commission statements.
- Perform general office duties such as filing, answering phones, and routine correspondence.
- Order office supplies as needed.
- Communicate with owners and associates
- Establish and maintain interpersonal relationships
- Manage office functions as directed by management
- Telemarketing targeted prospects.
- Gathering email address for prospect database.
- Updating prospect database.
- Send introduction emails to prospects.
- Scheduled follow-up telephone conversations.
- Assist as needed based upon the request of the RIA department management.

Supervisory Responsibilities: None

Supervision:

Receive training and guidance with respect to general objectives; in the majority of tasks and projects assigned determine methods, work sequence, scheduling, and how to achieve objectives of assignments; operate within specific policy guidelines.

Other Duties and Responsibilities:

- Comply with all employment policies, practices and procedures.
- Participate in proactive team efforts to achieve departmental and company goals.
- Perform other duties as assigned.
- Provide leadership to others through example and sharing of knowledge/skill.

Knowledge Requirements:

- Knowledge of accounting, bookkeeping, administrative and clerical procedures and systems such as word processing, managing files and records, and other office procedures and terminology.
- Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.

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Education and Experience:

Associate's degree (A. A.), Bachelor's degree (B. A.), or equivalent from a college or technical school; or equivalent combination of education and experience.

Language Skills:

Ability to read, analyze and interpret general business documents, customer data, insurance policies, etc. Ability to write information and respond to questions from supervisors, clients, customers, and the general public.

Mathematical Skills:

Ability to add, subtract multiply and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent. Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, and area.

Reasoning Ability:

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral diagram, or schedule form.

Computer Operations:

Proficient personal computer skills including electronic mail, record-keeping, routine database activity, word processing, spreadsheet, graphics, etc.

Planning/Organization:

Handle multiple tasks and projects simultaneously.

Physical Environmental Demands: see below on-the-job time spent in the following activities.....

	<u>Amount of Time</u>
Stand:	Under 1/3
Walk:	Under 1/3
Sit:	Over 2/3
Use hands to finger, handle or feel:	Over 2/3
Reach with hands and arms:	Under 1/3
Climb or balance:	Under 1/3
Stoop, kneel, crouch or crawl:	Under 1/3
Talk or hear:	Over 2/3

Weight lifted or force exerted:

	<u>Amount of Time</u>
Up to 10 pounds:	Over 2/3
Up to 25 pounds:	Under 1/3
Up to 50 pounds:	Under 1/3

Working Conditions:

Well-lighted, heated and/or air-conditioned indoor office setting with adequate ventilation.

Physical Activity Level:

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Sedentary physical activity performing non-strenuous daily activities of an administrative nature.

Manual Dexterity:

Manual dexterity sufficient to reach/handle items and work with the fingers.

Vision:

No special vision requirements.

Work Schedule/Hours:

Monday through Friday, 8:00am to 5:00pm

Travel:

No special travel requirements.