



Administrative Assistant – Rockwood Wealth Management

Rockwood Wealth Management is an established financial advisory firm serving clientele from our main office in New Hope, PA. We are in the family wealth management business focusing on high net worth clients, families, and business owners. Through a planning process built on integrity, expertise, and attention to every last detail, we navigate our clients through every phase of comprehensive financial planning and discretionary investment management. We have been serving this area and regional niche for more than 10 years and have a constantly evolving succession plan in place to ensure that we'll be here 40+ years from now.

We are currently seeking an **Administrative Assistant** in our **New Hope, PA** office who has experience working in a fast-paced professional environment, is highly organized and is detail oriented. This position is responsible for providing a broad spectrum of support to our team in a fast paced, challenging and rewarding environment. The position covers a wide range of responsibilities including, but not limited to:

- Communicate in person, via phone, and electronically with clients who expect the highest levels of service and professionalism.
- Purchasing and working with vendors related to office management.
- Coordinates the scheduling of team appointments, meetings, and travel arrangements; greets team's visitor(s) or client(s).
- Initiates and monitors administrative details to serve our firm's clients with excellence.
- Strong business mathematical skills and keen attention to detail.
- Works in conjunction with Advisory Teams to initiate and organize client meetings, follow-up on meetings and respond to client inquiries regarding actions taken to accomplish goals.
- Executes all functions necessary to maintain accurate electronic database of client information, including maintaining well indexed and up-to-date electronic file systems for correspondence, reports and reference material, confidential and non-confidential material, in accordance with compliance guidelines and regulations.
- Gathers, records, and processes pertinent information from clients or financial institutions for record maintenance or further analysis by other team members.
- Personal integrity and ability to discreetly handle confidential data.
- Maintains the highest Compliance standards by adhering to the firm's Human Resources policies, Compliance policies, professional designation standards, and our industry's regulatory standards to mitigate risk to the firm.

Desired Qualities and Skills

The successful candidate will have:

- Demonstrated excellent computer literacy/skills and knowledge of specialized office programs, including strong proficiency within Microsoft Office products, specifically Microsoft Excel and Word
- Demonstrated knowledge of file management principles and, with assistance from internal training resources, demonstrates competency in utilizing software applications that are firm specific.
- Aptitude and passion for learning new things quickly with a strong work ethic in an ever-changing environment.
- Capability to excel in a team environment as well as working independently.



ROCKWOOD WEALTH MANAGEMENT

- Desire to serve clients and work alongside co-workers with excellence
- Proven technical, analytical, and problem-solving skills
- Strong communication skills, both verbal and written
- Strong organization skills and systems acumen
- Personal integrity and ability to discreetly handle confidential data

A bachelor's degree is preferred; but not required. Experience in administrative support, customer service, or accounting in a financial, investment, banking or accounting firm is strongly preferred. Priority will be given to local candidates.