



Virtual Executive Assistant/Marketing Assistant

Rockwood Wealth Management is an established financial advisory firm serving clientele from our 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 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 15 years and have a constantly evolving succession plan in place to ensure that we'll be here 30+ years from now.

This is a unique opportunity unlike most in the financial services industry. First, our firm is completely independent...there is no broker dealer affiliation. Therefore, as fiduciaries our loyalty belongs exclusively to our clients. We also offer a competitive compensation structure for our employees (salary and incentive bonus). You will be a member of a collaborative and supportive team of high-performing colleagues all working hard to help us grow a successful and multigenerational business.

We don't trade much; we aren't a product-centric firm. We focus equally on our clients' comprehensive financial planning deliverables and investment management. This is both a high-level virtual administrative position and (by supporting the CEO with our sales process) a marketing/relationship-centric role, so the right candidate is going to be equally comfortable organizing the CEO's calendar, while also communicating with various types of prospective clientele to schedule and coordinate meetings via phone and email.

All inquiries will be held in strict confidence.

At a minimum, successful candidates will have:

- High school diploma.
- Bachelor's degree in business administration, marketing, or related field is preferred, but not required.
- Flexible work hours.
- A genuine interest in the wealth management industry.
- Excellent written and verbal communication skills.
- Exceptional time management skills and an ability to organize and coordinate multiple concurrent projects.
- Strong sense of productivity and self-direction.
- Comfortable taking ownership and responsibility of day-to-day tasks, even while working remotely.
- Confidence, presence, and a professional disposition.
- Relentless positivism.
- Personal integrity and ability to discreetly handle confidential data.
- Functional skill set with Microsoft Office 365.
- Desire to contribute to the success of a fast-growing but humble company.
- Willingness to take on additional firm project work if needed.

Duties and Responsibilities:

- To work side-by-side with the CEO to manage the firm's sales process and prospective client pipeline. Including but not limited to:
 - Correspondence and communication with prospective clients including meeting scheduling, confirmation, and pre-meeting preparation and notes.
 - Lead pipeline prioritization and management.



- Work with CEO to implement the firm's strategic marketing plan. Including but not limited to:
 - Writing/reviewing/editing firm newsletter and content for firm website.
 - Scheduling prewritten/preapproved social media/marketing content and responding to posts.
 - Coordinate or do basic graphic design work.
 - Handle event planning and coordination for firm's COI events.
- Provide real-time and high-level administrative support for the firm's CEO – including but not limited to:
 - Calendar management (both personal and business).
 - Scheduling appointments for CEO (both personal and business).
 - Inbox and task management.
 - Make gift purchases and send personal cards on behalf of CEO.
 - Manage CEO's travel logistics and activities, including accommodations, transportation and meals.
- Perform other additional firm-related professional duties as assigned, including specific firm project work for the CEO and Investment/CRM team.

Salary and Benefits Information:

- Base salary commensurate with experience plus incentive bonus plan.
- 401(k) plan with safe harbor matching employer contribution and discretionary profit-sharing plan.
- Company covered employee medical and dental benefits.
- Employer sponsored STD/LTD.
- Approved education and conference allowance.
- PTO & Paid Holidays.

Disclaimer: All employment offers are contingent upon the successful completion of a background check.

All inquiries can be confidentially submitted to Careers@RockwoodWealth.com with your CV and cover letter.