

Client Support & Executive Assistant

Ancora is seeking an experienced financial service professional for this multi-faceted role. The primary focus is on providing exceptional client service while also ensuring efficient day-to-day administrative support and local events coordination.

Location

This position is located at Ancora's Bloomfield Hills, Michigan, office.

Duties and Responsibilities

Client Service

- > Follow custodian workflows to prepare and complete new account documentation, security transfers, wire transfers, margin applications, etc.
- > Serve as a primary contact for local client and vendor inquiries via phone, email or mail, acting as a liaison between other internal groups to ensure complete client satisfaction
- > Follow internal processes to maintain accurate client and vendor records and generate reports from systems such as Microsoft Dynamics CRM, eMoney Advisor and Advent APX

Administrative Support & Events Coordination

- > Provide high-quality administrative assistance to local managers through the completion of a broad variety of tasks including but not limited to scheduling and calendar maintenance, expense reporting, preparation of correspondence and meeting materials
- > General office manager and reception tasks such as maintaining kitchen and office supplies, greeting callers and visitors, organizing incoming and outgoing mail, coordinating refreshments or meals, printing and assembling meeting materials
- > Plan and execute company-sponsored events and entertainment for local clients and prospects
- > Seek out industry events and coordinate attendance to help build brand awareness in the SE Michigan market

Qualifications

- > Bachelor's degree or equivalent in business or relevant field
- > Minimum 3-years of financial services industry experience
- > Minimum 6-years of client-facing experience in a customer service or operations role
- > Strong PC skills including Excel and other Microsoft Office programs
- > Working knowledge of Microsoft Dynamics CRM, Advent APX and custodial systems preferred
- > Office administration experience (phone system, copy/fax machine, postage machine, presentation binding) preferred
- > High ethical standards and ability to maintain confidentiality
- > Keen attention to detail and accuracy with a strong work ethic
- > Team-oriented with effective interpersonal skills including ability to communicate professionally
- > Professional appearance and demeanor

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www.ancora.net

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Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management and retirement plan advisory services to individuals and institutions.

Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

Visit www.ancora.net for more information.

Apply

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