

*Company:* Brick Street Financial – Thrivent

*Position:* Office Assistant

*Position Overview*

This position is responsible for providing administrative, client relationships, and sale support to the financial advisor.

*Essential Job Functions*

- Greet guests when they arrive at office
- Answer Phone – Take Messages – Schedule Appointments
- Scan documents into shared files as directed
- Manage client data in salesforce – make sure every client has complete information
- Each month call clients enlisted in monthly sales campaign
- Assist members in directing choice dollars
- Send monthly emails on first of each month regarding timely topic in market
- Make reminder calls for appointments
- Mail all items at post office as needed

*Other Necessary Skills:*

- Communication
- Organization