

human investing®

6000 Meadows Rd, Suite 105

Lake Oswego, OR 97035

503-905-3100

www.humaninvesting.com

Job Title:

Spring 2024

Workplace Advisory Administrator

Full time, non-exempt

In office/work from home (upon approval)

Company Overview: Human Investing is a full-service financial management company co-founded by its current CEO, Dr. Peter Fisher. Human Investing's mission is to faithfully serve the financial pursuits of all people. Human Investing has been serving clients as a fiduciary since 2004.

Position Overview: The Workplace Advisory Administrator role supports a dynamic team serving a wide range of corporate and institutional clients. The role provides administrative and operational assistance to the Workplace Advisory team as well as interacting with external contacts and clients. The role reports to the team's director and will work closely with all members of the team.

Responsibilities:

- Manage team calendars, coordinate and schedule internal and external meetings
- Prepare all client-facing materials including presentations, reports, and other collateral
- Leverage workflow and task management systems to ensure team is fulfilling contractual services and maintaining client touchpoints
- Maintain records, systems, and workflows related to clients, COI and prospect contacts, services, and projects
- Support team's communications efforts, including drafting email campaigns and newsletters
- Fielding all incoming calls to the team's number
- Ability to learn and understand industry specific regulations and terminology
- Other responsibilities as assigned as assigned by Team Lead:
 - Team projects
 - Broader company operational initiatives

Skills Required

- Excellent oral and written communication
- Good time management
- Good listener and detail-oriented
- Able to work as part of a team and independently as needed
- Able to think critically and creatively to solve problems
- Able to take initiative and provide new ideas

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Qualifications:

- College degree
- 2-3 years of previous experience working in customer service preferred
- Experience with contact management systems
- Experience with data management and analytics reporting
- Proficient computer skills and experience using Microsoft Office tools including excel

Other Skills and Competencies

- Personal integrity
- Professional, friendly demeanor
- Reliable
- Attention to detail
- Analytical
- Organized
- Good problem solver
- Excellent written and verbal communicator
- Flexible team player who is highly adaptable to change and open to new ideas
- Willingness to take initiative
- Successful at following-through on tasks and projects
- Desire to learn
- Experienced in prioritizing work and working to deadlines

Benefits:

- Fully paid dental + vision insurance
- Fully paid medical insurance + Funded H.S.A or HRA
- Paid time off + Sick time
- Fully paid Long Term Disability Insurance
- 3% non-elective 401(k) contribution
- Discretionary Profit Sharing
- Discretionary company bonus program

Work Schedule:

Mon-Thursday 8:30a-5p, Friday 8:30-4p

Salary Range:

\$58,000 - \$60,000

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How to Apply:

Interested candidates please submit a cover letter with resume to jill@humaninvesting.com

Human Investing is an equal opportunity employer. All applicants will be considered for employment without attention to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran or disability status.