



Accredited Investors

WEALTH MANAGEMENT

Wealth Management Assistant

Accredited Investors Inc. is seeking a talented full-time Wealth Management Assistant to support a team of advisors within an industry-leading and nationally recognized wealth management firm. The Wealth Management Assistant will be accountable for scheduling internal and external meetings, assisting with documentation and data management, and helping with various administrative components of client service. The ideal candidate will have strong attention to detail and exhibit independence with an ability to proactively solve problems. Possessing a team-player mentality is imperative along with high levels of competency in several critical areas: organization, adaptability, transparency, client focus, and technology.

Primary Responsibilities:

General Administrative Functions:

- Schedule client meetings for lead wealth managers
- Schedule internal meetings and actively manage calendars for a team of wealth managers
- Prepare meeting rooms and technology for internal meetings
- Notarize and help organize document signing for clients
- Assist with mailing and scanning services
- Track and submit continuing education credits
- Provide backup for others on the administrative team, including front desk, and other needs as requested
- Assist with firm events and catering needs as requested
- Uphold the company's culture of compliance and adhere to policies set forth in our compliance manual.

Documentation and Data Management:

- Proofread and process meeting summary letters
- Draft and assist with delivery of various client communication and letters
- Initiate and help track tasks in CRM database
- Help maintain CRM database with accurate information as documents and new information is received
- Assist with efficient sharing of information and documents with outside attorneys, CPA's, insurance agents and other advisors

Required Knowledge, Skills and Abilities

- Exemplary time management skills; ability to handle multiple concurrent assignments with a high degree of accuracy, and meet deadlines in a high-pressure environment
- Strong proficiency in Microsoft Outlook, and Microsoft Word required.
- Outstanding written and verbal communications skills
- Ability to exercise independent sound judgment.
- Self-starter who is resourceful, organized and demonstrates meticulous attention to detail. Must be comfortable reaching out to clients for scheduling via phone and email.
- Ability to work independently in a collaborative team environment.
- Flexibility in work schedule during high volume periods or when critical events or deadlines exist.
- Physical demands: Ability to lift 10+ pounds. Ability to efficiently operate all job-related office equipment (telephone, computer, calculator, fax, copier).

Education and Experience

- 3-5 years administrative support experience

Experience Accredited

Accredited Investors Wealth Management®, based in Edina, Minnesota, is nationally acclaimed for the delivery of comprehensive fee-only Wealth Management services. We serve high net worth clients using an individualized service model. Our clients value our strong level of attention to detail, responsiveness to their needs and professional style.

As a firm, in addition to serving our clients, we are engaged in community outreach and various green initiatives. Our benefits include paid time off for volunteer opportunities. Our employees enjoy a beautifully appointed facility, including a fitness center, state-of-the-art technology, and amenities that enhance our work environment. Development and training of our firm's talent is a top priority.

Accredited Investors Wealth Management® offers a competitive compensation and benefits package including: medical; dental; disability coverage; a 401k plan with a generous employer match; life insurance; a continuing education reimbursement plan; a marketplace-leading time-off allowance; and firm wide profit sharing. Accredited was recognized as a [Best Places to Work for Financial Advisers](#) by Investment News in 2018 and 2019.

For more information about our firm, please visit our website at Accredited.com.

Please direct your cover letter and resume to: resumes@accredited.com.