Plimsoll Mark Capital (a division of Clearstead) is seeking an Administrative Assistant/Client Service Associate in our downtown Portland, Maine location. The candidate will provide direct support to the office and Senior Managing Director on a wide range of administrative work and investment and wealth management work for high-networth individuals and entities.

**In this position you will:**

* Coordinate Investment Account Transactions such as opening and closing brokerage accounts, transferring assets, money movement, charitable gifting, trust distributions, account reconciliations, buying and selling securities and general account administration
* Develop a basic familiarity of the tools available to complete assigned projects in a paperless environment
* Communicate directly with clients to research and solve client issues
* Develop a basic knowledge of all assigned clients through reading Commence notes, studying client files and completing assigned projects
* Assist in the scheduling of client meetings, and the coordination and finalization of client meeting materials
* Assists in office organization, filing, scanning of documents to the client directory and electronic file creation
* Upload client files to portal
* Assist the Senior Managing Director (SMD) with administrative duties such as logging client emails into Commence, preparing monthly expense reports and arranging necessary travel for SMD
* Complete new client and exit client checklists
* Maintain client database (CRM) with up-to-date information
* Assist in the ordering, receiving, stocking and distribution of office supplies
* Professionally answers all incoming calls and directs the calls to the appropriate employee
* Greets clients/guests in a professional, friendly and hospitable manner and directs them to the appropriate location
* Receive, sort and forward incoming mail
* Coordinate the pick-up and delivery of express mail services (FedEx, UPS, etc.)
* Support business development activities
* Complete other duties as assigned

**The successful candidate will have:**

* 2-3 years of related experience at an investment management firm, law firm, accounting firm or financial institution
* Knowledge of investment-related operational procedures
* Management: ability to work under pressure, organize and manage multiple priorities in a demanding environment where time management, attention to detail, follow-through and meeting deadlines are critical
* Strong computer proficiency (e.g. Word, Excel, Adobe and Outlook)
* Experience with Fidelity, Schwab, Portfolio Center, or Tamarac is a plus
* Strong client orientation
* Excellent interpersonal and communication skills, written and verbal
* Strong team player
* Commitment to company values

**The qualified candidate can expect:**

* A flat, bureaucracy-free organizational structure that fosters creative thinking and involvement at all levels of the organization
* The opportunity to join a growing employee-owned firm that offers professional growth in an industry that is both dynamic and intellectually challenging
* An opportunity to work with high-profile private clients and institutions across the country
* A competitive base salary with an incentive bonus program
* 401(k) Savings plan with company contributions
* Health, Dental, Vision, and Long-term disability insurances
* Generous paid time off program

We are Plimsoll Mark Capital, a division of Clearstead…an independent institutional and wealth advisory firm.

We advise nearly 120 institutions and 500 private clients on more than $20 billion of assets. Our institutional clients include [retirement funds](http://www.hartlandco.com/?page_id=140), [endowments and foundations](http://www.hartlandco.com/?page_id=16), and [healthcare organizations](http://www.hartlandco.com/?page_id=142). Our private clients are families, individuals, and related entities.

Our firm was established in 1989 and is owned 100% by its professionals and Board of Directors. Our only source of revenue is fees paid by our clients for financial advice. We are not affiliated with any firm, nor do we receive revenue from any source that impairs our ability to provide objective advice.

Our independence assures our clients of top quality, objective service, in our investment, tax, estate, and financial advice. Our independence also helps us attract and retain top people.

We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, national origin, disability status, protected veteran status or any other characteristic protected by law.