We are seeking an Administrative Assistant at our downtown Cleveland, Ohio wealth management firm.  The candidate will provide direct support to the Priviate Client Group and Senior Managing Directors on a wide range of administrative work for individuals and entities.

**Position responsibilities:**

* Provides administrative support to the Private Client Group (PCG) during various production seasons. This includes processing incoming tax data and outgoing tax returns, quarterly tax projections, quarterly investment reports, and bi-annual net worth reports.
* Utilizes production season trackers to monitor the status of deliverables through the various stages of the production process and across multiple employees, to ensure timely completion.
* Coordinates Investment Account Transactions at Fidelity and Schwab such as opening and closing brokerage accounts, transferring assets, money movement, charitable gifting, trust distributions, reconciliations and general account administration
* Communicates directly with clients to research and solve client issues
* Assists in the coordination and finalization of client meeting materials
* Assists in office organization, filing, scanning of documents to the client directory and electronic file creation
* Uploads client files to portal
* Develops a basic familiarity of the tools available to complete assigned projects in a paperless environment
* Completes new client and exit client checklists for assigned Managing Director
* Completes other duties as assigned

**Essential skills and experience:**

* 2-5 years of related experience at an investment management firm, accounting firm or financial institution
* Knowledge of investment-related operational procedures
* 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

**Clearstead is committed to building a culturally diverse workforce and strongly encourages applications from minorities and women.**

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.

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 Clearstead…an independent institutional and wealth advisory firm in Cleveland, Ohio.

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.