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# Example of Advisor Assistant Job Description

Our company is looking to fill the role of advisor assistant. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for advisor assistant

* Model & coach your team on client advice and education, problem resolution and prevention at first point of contact, and advocate for digital enablement and multichannel usage
* Calendar management of senior partners
* Proactive coordination of client meetings and events
* Scheduling, coordinating meeting space between our offices
* Assisting advisor with meeting preparation and presentation formats
* Data Gathering (new and existing clients), organizing and collecting financial planning data
* Interacting with clients and advisors to onboard and service clients, both in-person and remotely
* Utilizing Salesforce CRM to assign internal tasks/delegating workflow, scheduling
* Managing and organizing internal data
* Maintaining office supply stock

## Qualifications for advisor assistant

* Knolwedge of indirect tax functionality in systems - such as SAP, Oracle, other ERP systems, tax engines or billing systems
* High School diploma and (7+) seven plus years experience in providing secretarial and administrative support to executives at a vice president/department head meeting level in a major function within a large financial planning, investment management or other financial services environment
* Advanced concepts, principles and practices of providing executive support
* Performing diverse administrative tasks for a top level executive while maintaining strict confidentiality
* Project management – overseeing and tracking client initiatives and internal projects
* Assisting with preparation of account forms, electronic signatures, and delivery of forms