

Overview	
Job Title:	First Impression Associate
FLSA Status:	Non-exempt
Reports To (Title):	Client Service Manager
General Summary:	Christy Capital Management, Inc. is a financial planning firm in the Macon, GA area. Our office is looking for a First Impression Associate. Since you will be the first person that clients, prospects, and business associates see as they walk through our door, we are looking for an individual who can always maintain a professional appearance and attitude. In this position, you will assist with a variety of clerical and administrative responsibilities.

Principle Duties and Responsibilities	
Responsibilities	<ul style="list-style-type: none"> • Greeting clients, prospects, and business associates • Answering phone calls, directing calls as appropriate, and taking messages • Managing email and mail correspondence • Maintaining the reception area and conference rooms • Preparing client appreciation gifts • Managing inventory of office supplies and equipment

Job Specifications	
Experience Requirements:	<ul style="list-style-type: none"> • Microsoft Office Suite proficiency in Word, Excel, PowerPoint, and Outlook • Salesforce experience preferred but not required
Education Requirements:	<ul style="list-style-type: none"> • High School diploma or equivalent required • Associate degree or bachelor's degree preferred
Preferred Experience, Education & Training:	<ul style="list-style-type: none"> • Minimum of <i>two</i> years of experience in an administrative, operations and/or client service role, preferably in the financial services or securities industry
Ideal Candidate DNA:	<ul style="list-style-type: none"> • Excellent character and reputation • Detail oriented, motivated, enjoys multi-tasking in a fast-paced environment • Responds well to changing and evolving job duties and expectations • Able to work independently and is also comfortable with close teamwork • Good organization and project management skills • High sense of urgency and strong work ethic • Strong verbal and written communication skills • Ability to discretely handle confidential data • Calm and professional appearance

The statements above are not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the job. Duties, responsibilities, and activities may change at any time with or without notice.