MILESTONE
WEALTH
An Independent Practice

Join Our Team as a Client Concierge!

Are you self-motivated, hard-working, and enjoy wearing many hats?

Our Client Concierge position is a key role that sets the professional tone for our company with our clients, future clients, vendors, and community here in Greenville, NC.

Responsibilities:

- Perform administrative duties and manage communication
- Create and maintain Standard Operating Procedures for office tasks and compliance
- Process checks, ACH requests, and wire transfers from clients
- Maintain client information through CRM
- Compile and analyze data to create/maintain records, reports, and PowerPoint presentations
- Event planning including arranging meeting space, food, and beverage, set up, and tear down

Qualifications:

- High school diploma, some college preferred
- 2+ years of administrative experience required
- Excellent communication skills – upbeat and friendly
- Advanced skills in Microsoft Office (Word, Excel, Outlook, PowerPoint)
- High levels of integrity and discernment
- Excellent organizational and time management skills
- Superior multi-tasking and follow-through abilities
- Team player

We are proud to offer:

- Competitive salary based upon experience – $50,000 - $65,000
- Bonus opportunities
- Benefits package including medical and disability insurance
- 401k match of 6%
- Paid time off
- Great training
- Beautiful office environment
- Education Incentive Plan

Interested?

If you are looking for a position where what you do makes a difference, please apply and send a copy of your resume to: **dave@milestonewealthusa.com**.

Learn more about our growing company at **Milestone Wealth**.

Why Join Us?

Our company believes that we are only as good as the people we employ. Join a company that values its employees and rewards them for a job well done! Our vision is to be the most successful independent wealth management practice in eastern North Carolina. Our mission is to empower families to be faithful stewards of their finances to achieve their life goals and leave an enduring legacy.