



## Administrative Coordinator

We are seeking an Administrative Coordinator for our fee-only wealth management firm in Las Cruces, NM. Such an individual will desire to work in a team-oriented independent RIA firm; will be involved in all aspects of the business, learning, and shaping the way we care for our clients. Candidates that fit into our firm and culture will embrace technology, enjoy a collaborative environment, and hold in high regard serving clients in a fiduciary capacity. We value our clients, and our clients value our services.

### Position Highlights

The Administrative Coordinator will work closely with the Operations Team and is responsible for the overall daily function of front office operations.

### Specific Areas of Focus Include:

- Provide general administrative services to advisors, such as maintaining calendars and schedules.
- Manage a high volume of daily interactions with clients, guests, and colleagues.
- Generate client reporting in preparation for client reviews as needed by Investment Advisors.
- Manage the reception area, and answer phones
- Prepare incoming/outgoing correspondence
- Coordinate and schedule office events
- Ensure all transaction processing follows internal procedures and industry regulations.
- Creates and maintains client and/or prospectives records in Client Relationship Management CRM database.

### Qualifications

- Strong organization, time management and analytical skills
- Strong interpersonal, written, and oral communication skills
- Excellent telephone etiquette and ability to manage competing priorities
- Self-starter, productive, works well with a team and independently
- Attention to detail and understand the importance of data accuracy
- Independent, motivated, proactive, and focused
- Proficiency in Microsoft Office Suite
- 3 plus years of administrative assistant experience preferred

### Perks

- Competitive compensation and benefits
- Reimbursement of approved professional development expenses
- Customized career development process
- 401(K) and company matching
- Health care benefits

**Westwind Capital, LLC is an Equal Opportunity Employer**

Las Cruces, NM (575) 556-8500 | Denver, CO (720) 339-0855

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