



Putting client needs first is deeply rooted in the Bulman Wealth Group culture and at the core of everything we do. This is an opportunity for someone who is dedicated to serving clients, has a desire to be a part of a growing team, and wants to contribute to an amazing firm culture. If this sounds like you, let's talk.

1. POSITION TITLE: First Impressions Coordinator

2. GENERAL SUMMARY OF DUTIES AND RESPONSIBILITIES

The First Impressions Coordinator will deliver exceptional service by performing various tasks in support of our clients and the day to day operations of the firm's office. This position will interact heavily with clients in person, on the phone, and through written communication; maintaining a strong, client first relationship is expected.

3. PRIMARY JOB DUTIES

- Manage all incoming phone calls
- Record notes from every client conversation in the database
- Sort and distribute all incoming mail
- Assist with copying, scanning, and mailing as requested by the team
- Schedule and reschedule all client appointments
- Confirm all appointments; send virtual meeting details
- Greet and host all office visitors in alignment with BWG core values
- Maintain office atmosphere
- Manage office supplies and purchasing
- Run office errands, as necessary
- Assist with marketing activities including events, mailings, and outreach
- Support Operations Team with CRM management

4. SKILLS, KNOWLEDGE, AND ABILITIES

- Ability to prioritize tasks and manage time
- Attention to detail and accuracy
- Consistent follow-through
- Process driven
- Excellent communication skills, both written and oral
- Uses discretion, exercises good judgement, and maintains confidentiality of sensitive information
- Demonstrates persistence to achieve high quality
- Strong appreciation for the importance of completing tasks on deadline
- Strong phone and presentation skills
- Command of the English language and grammar
- Experience working in a fast-paced environment
- Knowledge of computers and G-suite
- Ability to multi-task

5. PERSONAL SKILLS

- Desire to build relationships with people; pleasant disposition
- Highly organized
- Self-starter
- Flexible
- Service oriented
- Desire to support a team
- Strong work ethic
- Dependable

6. MINIMUM REQUIREMENTS

- High School diploma
- Minimum of 1 year experience supporting an office environment