

Office Manager

WealthVest Marketing—based in Bozeman, MT, and San Francisco, CA—is a financial services marketing and distribution firm specializing in high-quality fixed and fixed index annuities from many high quality insurance companies. For the 10,000+ baby boomers who are retiring daily, retirement is top of mind. Americans have purchased \$24.2 trillion in retirement assets to insure their golden years, according to the ICI. WealthVest specializes in the marketing and distribution of these essential building blocks of retirement savings for financial professionals and their clients across the nation. As a member of our team, you will be empowered to be innovative, solutions-oriented and a driver of a culture of continuous improvement. Our goal is to enable you to reach your professional goals and be an integral part of a team of people driving to achieve departmental and overall organizational goals.

Operations department team members work in a high-energy, fast-paced environment providing efficient, accurate and professional support and service to our wholesalers, agents, carriers, other partners and co-workers. The environment we operate in requires every member of our team to be problem-solvers, finding solutions when those solutions may not be easy to see. It also requires each team member to learn and grow, to help your co-workers learn and grow and to continually refine our systems and processes to make our department more efficient and effective. We pride ourselves on not only thinking on behalf of ourselves and WealthVest, but for our customers and carriers. Our team focuses on and communicates what can happen versus what can't happen. These standards are critical to achieving our individual, team and organizational goals to deliver best-in-class service.

Job Purpose/Role:

This position is responsible for managing the Bozeman office creating and maintaining a challenging, fun, collaborative and energetic work environment. This includes working with and being the main point of contact for the building owner and coordinating any decisions/requests/requirements from and of the building owner. Ensuring the office is orderly, organized and operating within and supporting guidelines and policies. Managing vendors, including cleaning company, construction company, and any other vendors we utilize. Greeting all office visitors and logging any visitors who need entry to the office. Planning and managing office events, including partner visitor trips, training and team events. Managing annual/quarterly/monthly inspections and requirements working with vendors as necessary. This position would also support administrative requests from leadership team members, including assisting in new hire orientation, and running business errands. The Office Manager should be able to ensure the smooth running of the office and help to improve company procedures and day-to-day operations.

Key Requirements, Skills & Experience

- Problem solving and decision-making ability
- Proactive and adaptable to new/unforeseen situations
- Motivated with strong work ethic and positive attitude
- Strong verbal and written communication and interpersonal skills
- Strong attention to detail and a high degree of professionalism
- Ability to work in a fast-paced environment and manage several tasks simultaneously within deadlines
- Ability to work independently as well as with a team
- Ability to occasionally lift office products/supplies up to 20 lbs.and stand; walk; use hands to finger, handle or feel; and reach with hands and arms.
- High school diploma (or equivalency) required; college degree preferred
- 5+ years working experience; 2+ years of office management/administrative assistant experience or equivalent required
- Strong working knowledge of PCs, Microsoft Office products (Word, Excel, Outlook)

** Please send all inquiries to Kim Parlett, kparlett@wealthvest.com