



Office Coordinator

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Take the next step in your Office Management career where you can play an integral role in Omega Wealth Management's continued growth and success!

Reporting to Omega's Operations Manager, we are searching for an enthusiastic, full-time team member to lead Office Management duties – with the potential for increased responsibilities – in our small (yet dynamic), highly-respected wealth management company located in the hub of Arlington's Ballston community.

If you are a self-starter with extraordinary communication skills (both written and verbal), exhibit strong attention to detail and have a minimum of three (3) years experience working in a professional office environment, we may be a good fit for your next career move. What else makes you a top candidate? An ability to manage multiple priorities/deadlines is vital, while prior experience working in financial services or the insurance industry is preferred but not required. Another plus includes working knowledge of financial services client relationship management tools.

Primary Responsibilities:

- Meet, greet, and engage (virtually and in person) with a range of high net worth clientele
- Lead administrative functions such as filing system management, document scanning and copying, and mail organization
- Manage office supply inventory, vendor relationships, and office suite/building management needs
- Full-cycle scheduling, coordination and preparation for client meetings (documentation prep, post-meeting follow up communication)
- Manage company calendar and all client appointments
- Plan and execute client and team events (virtual and off-site)
- Office equipment management and inventory tracking
- Perform daily accounting tasks including electronic writing and depositing of checks
- Participate with the Service Team in the following activities:
 - client technology/portal assistance, money movement, invoice collection, data gathering/input, client account maintenance and research, client on-boarding/off-boarding, workflow development, and additional duties as assigned
- Coordinate quarterly newsletter publication
- Organize and distribute annual client holiday gifts, monthly birthday/anniversary cards

- Lead administration of office phone system, including our scheduled virtual days

Potential Growth Opportunities:

- Serve as primary liaison for Omega's technology stack
- Assist Operations Manager/COO with company's financial management administrative tasks
- Ad-hoc Executive Assistant-related duties including: travel planning/booking, marketing scheduling

Required Knowledge, Skills & Experience:

- Minimum of three (3) years working in a professional office environment performing related duties
- Strong interpersonal and written communication skills
- Flexibility to adjust to fluid scheduling needs
- Proactive, self-motivated problem solver with capacity to work under minimal supervision
- Sharp attention to detail
- Extraordinary organizational skills with an ability to multitask and meet deadline
- Keen ability to maintain confidentiality
- Efficiency in database management and Microsoft Office Suite with demonstrated expertise in Word, PowerPoint, and Excel (experience with Asana or related project management software is appreciated)
- Experience with Canva software or related software for marketing/branding/event needs
- Video Conferencing/Scheduling software: Calendly, Zoom, etc.
- Applicants with college degrees will be strongly considered

Salary:

- \$55,000+ benefits (based on a candidate's experience, professional/educational credentials, and demonstrated professional development)

How Omega Partners with its Team Members:

Omega thrives in a culture of collaboration, engagement, commitment, and support by offering the following full-time employee benefits:

- Paid holidays (including your birthday - or an extra day of leave), *plus* a Winter holiday break between Christmas and New Year's Eve
- Hybrid work schedule: Virtual Mondays & Fridays, In-office (Arlington, VA) Tuesdays - Thursdays (subject to change)
- Summer Fridays off
- Paid parking (if needed)

Following 90-Day Probationary Period:

- Flexible vacation policy
- Parental leave
- Health/dental/vision insurance plan or reimbursement of up to \$250/month; HSA included with company medical coverage if enrolled
- Basic short- and long-term disability and basic life insurance
- 3% Safe Harbor 401k annual contribution, regardless of your plan participation

About Omega Wealth Management:

Omega Wealth Management, LLC, is a woman- and minority-owned business, founded in 1999. Omega specializes in taking a holistic and comprehensive approach to working with people going through significant financial/business/life transitions and successful entrepreneurs. Currently, Omega has four advisors who are all CFP® professionals and three who are Certified Financial Transitionists® and we are looking to expand our business based on a well-articulated strategic plan using the Entrepreneurial Operating System®. We live and breathe the Omega Core Values: Authenticity, Human-Centered, Curiosity, Always Evolving, and Team Approach. We believe in the concept of “Walk the Talk”, and a focus on Balance in various aspects of our lives and work.