



Title Options: Marketing & Executive Assistant

About Us

Mosaic Retirement Planning, LLC is a comprehensive financial planning and investment advisory firm. MRP offers financial planning, annuities, insurance and investments to the public. Its founder has been providing solutions to retirees and pre-retirees since 2007 based on the belief that it's always right to put the client's interests first, resulting in a happy & loyal client base. MRP has adopted a financial planning process that is recommended by the CFP Board, which is widely regarded the gold standard for financial planning. MRP is an independent firm, and therefore does not promote any products, MRP provides custom planning to every client and uses a diverse array of products to implement the client's financial plan. MRP is committed to be the best in the region at personal retirement planning, for a reasonable cost. MRP's mission is to have a positive impact in the lives of the community, one family at a time. Visit www.mosaicretirementplanning.com for more information.

Faith * Responsibility * Integrity * Dedication is our Core Values. We look after one another and our clientele like angels, and we work toward being good stewards and want others on our team to have the same passion.

Position Summary

The Marketing and Administrative Assistant provides administrative, customer service and operations support to all areas of Mosaic Retirement Planning, LLC (MRP). The majority of this role is responsible for the development and execution of marketing initiatives at MRP. In addition to sales support to the CEO.

Duties and Responsibilities include, but not limited to:

Sales and Marketing

- Implement marketing campaigns, perform general operations duties, and other special assignments as needed.
- Miscellaneous project management to help drive MRP business.
- Compile marketing materials in preparation for client meetings.
- Attend various evening company events and assist in promoting the services of the firm.
- Conduct outbound calls to RSVP's of MRP events, such as confirmation and follow up calls.
- Brainstorm new business generating activities and events and operationalize from idea to full implementation.
- Schedule & confirm appointments for advisor(s) with clients, prospects or strategic business relationships.

Administrative

- Answer calls, greet clients and respond to client requests with professionalism & care.
- Operations & maintenance offacility including ordering office supplies, preparing refreshments for clients, conference room organization and general office organization.
- Update client and case information in the CRM.
- Process investment and insurance applications and ongoing service requests.

Critical Skills Sought

- Confidentiality: maintain all information related to customer accounts in strictest confidence.
- Strong sense of professionalism.
- Collaborative personality; work as a teammate in order to further the entire organization.
- Strong desire and ability to be a problem solver.
- Ability to prioritize assignments, adapt to changes in daily tasks when necessary and the ability to work under pressure.
- Outgoing personality with the ability to create new relationships.
- Good oral/written communication, organizational and problem solving ability.
- Capable of being able to receive feedback in order to grow professionally.

Qualifications

- High school diploma or equivalent, plus 3 years administrative or reception experience required.
- Sales or Business Development experience strongly preferred.
- 2 years experience in financial services, annuity or life products strongly preferred.
- Must be proficient in word processing, spreadsheet, adobe, and presentation software.
- Marketing and/or business development experience preferred.
- Willingness to obtain additional licenses, such as series Colorado life insurance license along with FINRA Series 7, 63.
- Strong knowledge of information technology & corporate communication a plus
- Must be able to pass a drug screen.

Why Work at MRP

- FLEXIBILITY & OPPORTUNITY
- Part-time or full time position available
- Work from home potential.
- \$\$\$\$-The ability to be a key part in growing a business. Strong incentive plan based on assisting with customer acquisition.
- Opportunity for advancement.
- Business casual/professional dress.
- Cohesive small team.
- Great place to make a big impact on many lives.

How to Apply

Send resume and cover letter to info@mosaicretirement.com. Cover letter should include the following:

- Please tell us why you are interested in this position. What skills make you a good candidate?
- Are you comfortable with this position being part time with the possibility of growth to full time? Why?
- This position with a small business based in Centennial, CO. Your presence will be needed in the office most days. Please explain your interest in this location, industry and company size.
- Please explain your experience and interest in performing both the administrative duties in addition to the marketing duties.

This description covers the major purpose and major functions of the job. It is not intended to give all details or a step by step account of the way each task is to be performed. Employees may receive other job related instructions and be required to perform other job related duties requested.
