Job Description	To assist a busy private wealth advisory practice with planning assistance at an expert level. This position will consistently follow high standards of business and professional ethics and legal and regulatory requirements when dealing with others and/or performing work activities.
Responsibilities	Responsibilities include, but are not limited to, the following: - Entering and maintaining client data in the comprehensive financial planning software. - Running investment reports and other client meeting documents. - Following up with the corporate office on client related issues. - Managing the check scanner, and E-paper software to maintain a paperless office. - Managing the check and securities log for incoming mail. - Assist with the website, social media, and marketing events. - Help with calendaring and meeting confirmation emails.