# **KADES-MARGOLIS CORPORATION**



	Division/Department	Operations
	Location	Wayne, PA
	Job Title	KMC Operations and Employer Plans Administrative Assistant

## **GENERAL DESCRIPTION:**

This position will support Operations with all needed administrative responsibilities as assigned and will also be a resource for Client Services when needed by answering and handling client calls as well as general advisor inquiries. This position will assist with the transfer out process and will also handle various assignments in support of all departments across KMC and KM Capital including support needed in the Employer Plans Department.

### **JOB RESPONSIBILITIES:**

### **Operational Support:**

- Support all departments across KMC including Operations, Employer Plans and Senior Management with various tasks and assigned project-based work. Take ownership of these projects and work with President of Operations relative to the management, organization and prioritization of these projects
- Assist with KM Capital monthly reporting, strategist changes, update campaigns
- File and retrieve organizational documents, records and reports as requested
- Work on KM Capital product changes, announcements of changes and updating of all collateral
- Perform general clerical duties to include, but not limited to, copying, faxing, mailing and filing as needed
- Maintain confidentiality in all aspects of client, staff and agency information at all times
- Additional responsibilities as assigned by President of Operations as needed

#### **Specific Employer Plans Support:**

- Oversee the process of sending follow up emails and letters to attendees of Employer Plans events and other events as needed.
- Review administrator publications as released and communicate opportunities to advisors.
- Support needed coordination of events including, but not limited to, confirming attendance, booth selection, room reservations, logos/ads needed, and ensuring all booth and marketing materials are prepared in advance.
- Work with various administrator group contacts with specific event details as needed
- Assist in Section 125 enrollments as needed
- Support SAGE program administrative functions including data entry, participant inquiries and problem resolution, and other duties as assigned.
- Handle all ads for Employer plans by needed deadlines in conjunction with KMC marketing resource. Communicate with enters of influence as to ensure timeliness of ad fulfillment.

### WORK EXPERIENCE REQUIREMENTS:

- 5+ years of Administrative Assistant experience in the financial industry
- Proficient in Outlook, Word and Excel
- Strong communication skills, both written and oral
- Must be organized and have the ability to multi-task while handling multiple projects simultaneously
- Must be extremely flexible with varying tasks and responsibilities while being a team player

### **EDUCATION REQUIREMENTS:**

• Associates degree preferred