



**STONEBRIDGE**  
Capital Advisors

**Title:** Office Administrator  
**Reports To:** Chief Administration Officer  
**Status:** Full Time

**Job Overview**

This important team member is the first point of contact for Stonebridge Capital Advisors and represents our commitment to client-centric service. This position provides support to our clients, portfolio managers and employees, organizing and coordinating our company's administrative functions. The Office Administrator will support and maintain a pleasant work environment, ensuring high levels of organizational effectiveness, communication and safety and smooth day-to-day operations in our office.

**Summary of Responsibilities**

- Answer and direct phone calls professionally.
- Meet and greet clients, vendors and visitors in a courteous manner.
- Collect, sort and distribute mail daily; prepare outgoing correspondence and/or packages.
- Schedule and prepare Conference Room for meetings.
- Schedule internal meetings and appointments for team members.
- Coordinate internal business luncheons as needed.
- CRM database administration.
- Create and maintain files.
- Assist with the administrative tasks and communication in support of our client service model.
- Maintain contact lists for birthday and workplace anniversary cards.
- Maintain inventory for all office supplies and equipment; places orders, restock materials.
- Coordinate service calls and maintain records for all office equipment.
- Maintain office condition; arrange repairs as needed.
- Assist with coordination of office furniture and moves.
- Support, promote and participate in company program initiatives.
- Serve on Host Team for Stonebridge Events.
- Participate in Stonebridge sponsored activities.
- Other duties as assigned.

## Stonebridge Capital Advisors, LLC

### Education, Licensing or Certification

- College degree preferred
- Previous office experience or management

### Qualifications

- Excellent time management skills.
- Caring client service and interpersonal skills.
- Possess excellent written and oral communication skills.
- Proficient use of Microsoft Suite applications.
- Knowledge of CRM database systems.
- Working knowledge of mail processes such as postage, FedEx and UPS.
- Handles all client information confidentially.
- Finance industry knowledge.
- Adapts easily in stressful conditions.
- This position requires the ability to occasionally lift office products and supplies, up to 25 pounds.

### Salary & Benefits

Stonebridge Capital Advisors offers a competitive salary based on experience and a comprehensive benefits plan that includes medical, dental and life insurance, 401(k), health savings plan, optional vision, access to gym facility, community volunteering, and paid company holidays.

Salary: \$60,000+

### Contact

To apply, please submit your resume and cover letter to [LWessel@stonebridgecap.com](mailto:LWessel@stonebridgecap.com)