



Receptionist/Office Assistant

Job Description:

This position is the first point of contact for the company with clients on the telephone and in person. The receptionist is responsible for the efficient management of the switchboard, greeting clients and setting the tone for a professional and welcoming reception at WMS Partners.

Responsibilities Include:

- Answering, screening and forwarding incoming calls while providing basic information when needed
- Taking accurate & complete messages
- Serving visitors by greeting, welcoming and announcing them per company policy
- Receiving and sorting daily mail
- Ordering and receiving deliveries of office and kitchen supplies
- Restocking office and kitchen supplies
- Updating appointment calendars and scheduling meetings/appointments
- Performing other clerical receptionist duties such as filing, photocopying, collating etc.

The receptionist is an operational role that enhances the client's WMS experience by providing superior client service both over the phone and during in-office visits.

Desired Skills and Experience:

- Prior working experience in a front office handling receptionist responsibilities
- Outstanding time management and organizational aptitude
- Strong work ethic with a high level of attention to detail
- Ability to organize, multitask, prioritize and work under pressure
- Proficiency in Microsoft Office applications (specifically Outlook, Word & Excel)

Qualifications:

- Bachelor's or Associate's Degree from an accredited college or university is desired
- 5+ years of related work experience inclusive of at least 2 years of direct receptionist/office assistant responsibilities is acceptable

Salary and Benefits:

- Pay/benefits are competitive based on industry standards
- Bonus eligible
- Benefits including 401(k)/profit sharing plan, health insurance, paid holidays, vacation and tuition assistance

- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities, if applicable; support amount will be determined by management each year

About WMS Partners:

Founded in 1993 and headquartered in Towson, MD, WMS Partners has over 50 employees and currently manages over \$4 Billion in assets for approximately 400 families.

We are a fee-only financial advisory and investment management firm. We customize our advice to each client, providing them with recommendations and implementation assistance to meet their specific goals and needs. Our client's families consist of professionals, retirees, corporate executives and business owners. The Firm's continued growth is primarily due to referrals from its existing client base.

WMS Partners LLC is an Equal Opportunity Employer.