

PART-TIME CLERICAL

The Firm

We are a 20-year old boutique investment management and financial planning firm that delivers premium level servicing to a group of high net worth clients. As a fiduciary fee-only firm we provide unbiased comprehensive financial advice across all disciplines of personal financial management with a significant focus on tax efficiency and tax planning. Our office is located in the Streeterville neighborhood of Chicago.

Job Description

We seek someone who will support the financial planning and investment management teams by assisting with administrative tasks. The position pays \$12/per hour.

Responsibilities will be primarily administrative and could include, but not be limited to:

- Managing and organizing client files
- Scanning client statements and other documents to our digital storage system
- Working 15 – 20 hours per week during the school year and up to 40 hours weekly during breaks and summer
- Other administrative tasks, as needed

Skills

- Detail orientation
- Strong organizational and administrative skills
- Ability to exhibit professional maturity
- Dependability
- Positive Attitude
- Quick Learner
- Microsoft Office proficiency in Word and Excel, preferred
- Ability to quickly learn and navigate various other software programs

Qualifications

- Freshman to Junior Year at a Chicago based College or University
- Financial related major, preferred but not required
- Available weekdays between 8 a.m. and 6 p.m. Through December 2018, Mondays and Wednesdays required.

Contact Information

Email: [hiring@tfa-llc.com](mailto: hiring@tfa-llc.com)