



Position: Service Coordinator

Full-Time, Salaried Position

Location: In-Person, Potential for Remote Flex

EViE Financial Group is an independent, values-based financial services firm located in Upper Marlboro, Maryland. While serving clients throughout the Maryland, DC, and Virginia regions predominantly, EViE advisors also assist and guide clients across the country with their financial planning and wealth management needs. EViE Financial advisors work as a connected but diverse team, and we focus first on serving clients with care, attention, and inclusivity. We have an education-first approach to both financial planning and wealth management, and our advisors work to deliver that with each interaction with clients and team members. To this end, we are seeking a full-time Front of House Coordinator to assist with these growing needs.

This is an opportunity to play a key role in a small, growing financial services firm where your potential to excel is unlimited. Because we are a small team, opportunities exist for diverse assignments and advancement in different directions. Our interest is in helping you find the right long-term fit in our firm as it grows, and to maximize your potential while meeting the needs of EViE Financial and its advisors.

Description:

We're looking for a fun, professional, and thoughtful person to join our team to manage appointment scheduling and calendar upkeep, along with greeting and assisting clients and other vendors or partners who visit our office in person. This person will manage our lead advisor's schedule according to our scheduling best practices and correspond with existing and potential clients regarding appointments. They will also likely do some light transcription of client meeting notes, as well as other administrative duties as asked.

This position is most fun if you enjoy interacting with people, especially in writing, and if your attention to detail and ability to plan ahead are skills you take pride in. We'll need a good communicator who can clearly express necessary details to both in-house team members and external parties.

Job Requirements:

- The ability and willingness to work in the office full time initially (flexible remote work may be offered after successfully working in the office for some time)
- Strong communication skills, both written and verbal
- Strong organization skills and ability to multitask
- Working knowledge of Zoom, Microsoft applications, and Google Docs
- Experience with or ability to quickly learn CRM software for data management



- Ability to successfully prioritize tasks and requests, and to manage follow-ups and reminders in a prompt and friendly manner
- Desire to maintain a welcoming environment within the office and with each communication sent to clients
- A growth mindset and ability to handle changes to internal or external tools
- Participation in firm marketing and community events
- Other administrative duties as assigned by manager or lead advisor

Additional Desired Skills/Attributes:

- College degree
- Desire to grow professionally in a financial services firm
- Client or customer service experience

In exchange for your time, energy, commitment, and experience, we offer a starting salary of \$45,000, profit-sharing bonus, retirement plan with matching, health insurance reimbursement, and a great working environment in a professional office near Largo Town Center. Team members who demonstrate mastery of their tasks have the option of hybrid remote work arrangements after a period of time. We are also open to a part-time position for the right candidate.

Anyone who joins our team should align with the values we have set out as a firm: Education first, Vitality in clients' financial lives, Independence in the approaches we take to serving clients, and Empowerment in delivering the services we offer. Additionally, the tenets of diversity, equity, and inclusion (DEI) are of utmost importance to us as a firm. EViE team members believe that everyone is welcome at the table, and we strive to promote inclusivity not only internally but externally when working with the community, colleagues, and clients.

EViE Financial Group is an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, gender, sexual orientation, national origin, disability status, protected veteran status, or any other characteristic protected by law. To apply, send resume and cover letter to melissa@eviefinancial.com. No calls will be fielded for initial inquiries into this position, but email will be checked and responded to promptly.