



## OFFICE ADMINISTRATOR

### JOB DESCRIPTION

Landmark Wealth Management, a SEC registered investment advisory firm, located in Getzville, New York, is seeking to fill an Office Administrator position. We are a premier, comprehensive boutique wealth management firm. Candidates interested in the position should have a bachelor's or associate degree. Applicants should possess good communication skills and be able to work well in a team environment. Additionally, candidates should have an aptitude for business applications, such as Microsoft Word, Excel, and PowerPoint. This position has opportunity for growth and promotion over time, based upon merit and performance.

### Responsibilities

- Overseeing administrative functions of the firm.
- Maintaining our suite and communicating with suite service vendors.
- Welcoming and receiving clients for meetings.
- Handling firm mail, client mailings, and quarterly mailing of client investment reports.
- Filing, copying, answering phones, taking notes, organizing lunches, and various other administrative tasks.
- Coordinating client seminars, client social events, and employee events.
- Proofreading and editing of marketing materials, proposals, and client communications.
- Acting as executive assistant to senior partners.
- Supporting our team with various ad hoc requests and projects.
- Interaction and assistance with our strategic CPA partner, Chiampou Travis Besaw & Kershner LLP (CTBK), including coordination of joint projects with CTBK, as needed.

This is not an exhaustive list of responsibilities; this position will allow for someone to make a meaningful contribution to Landmark Wealth Management

Landmark will provide flexibility to the ideal candidate including, but not limited to, the number of hours worked and start date of employment. Pay will be dependent upon experience.

Salary and benefits will be competitive. Candidates should be willing to work full-time.

Resumes with cover letters should be submitted **via email** as follows:

Brian K. Laible  
Managing Partner  
Landmark Wealth Management  
2410 North Forest Road  
Suite 101  
Getzville, New York 14068  
Email: [Brian@LandmarkFirm.com](mailto:Brian@LandmarkFirm.com)