

Job Title: Administrative Associate



Location: Carmel, IN

POSITION OVERVIEW:

As an Administrative Associate at Winthrop Capital Management, you are a vital member of our team. In this role, you help us maintain and build relationships with our individual and institutional clients. By being exceptionally organized and engaged, you will positively contribute to our culture. Your success will be reflected in your ability to hold yourself accountable, to continually learn, to provide and receive direct feedback, and to stay motivated to solve complex problems.

RESPONSIBILITIES:

- Help clients with account requests, including opening, closing and funding accounts, as well as transferring or withdrawing assets
- Manage and coordinate new account set-up process and internal documentation
- Maintain CRM data and distribution lists
- Assist in the production of new business proposals
- Coordinate meetings and communication with clients

SKILLS & QUALIFICATIONS:

- High School Diploma required; Associate's or Bachelor's Degree in related field preferred
- Prior administrative or client facing experience preferred
- High attention to detail, exceptional organizational skills, ability to focus and take ownership of tasks until completion
- Ability to communicate clearly and concisely, both orally and written, at all levels
- Ability to work independently and as part of a team
- Proficient with Adobe and Microsoft Office included but not limited to Word, Excel, and PowerPoint
- Prepared to take initiative, work flexibly to help the team achieve its goals, and respond positively to change

COMPANY DESCRIPTION

Winthrop Capital Management was founded in 2007. We implement value-oriented investment strategies in both equity and fixed income portfolios and serve both institutional and individual investors. Our goal is to provide outstanding long-term investment performance results consistent with the risk tolerance and investment constraints of each client. We seek to provide the highest level of service to our clients to help them achieve their investment objectives.

WCM MISSION

Our goal is to help our clients achieve successful financial outcomes in relation to their specific Investment Management objectives. To accomplish this, we focus on long-term goals and create solutions that will realistically help clients achieve those goals with minimum risk.

To apply, please send an updated, resume to:

Gregory Hahn
10201 N. Illinois Street,
Suite 275
Carmel, IN 46290

Or send via email to admin@winthropcm.com
All resumes are considered confidential.

Winthrop Capital Management is an equal opportunity employer.

Posted on 8/23/2023