Executive Assistant / Client Service Specialist

Full-Time | Cranberry Township, PA

About Hoffman Capital Advisors

Hoffman Capital Advisors is an independent Registered Investment Advisor (RIA) based in Cranberry Township, PA serving individuals, families, businesses, and non-profits through financial planning and investment management. We believe financial advice should be practical, personal, and fiduciary in nature. Our role is to come alongside clients and provide guidance, clarity, and confidence as they make financial decisions and plan for their future. We are a growing firm looking for the right person to become a key part of our team. This is not intended to be a back-office-only position. This person will help create an exceptional client experience while supporting advisors and helping the business operate smoothly.

Position Overview

The Executive Assistant / Client Service Specialist will serve as a central point of coordination for our clients while streamlining operations, scheduling, account administration, and internal processes. This role is ideal for someone who enjoys organization, anticipates needs before they arise, communicates professionally, and takes ownership over details.

Responsibilities

Client Experience & Service

- Serve as a primary contact for scheduling and client coordination
- Prepare meeting agendas, reports, paperwork, and follow-up tasks
- Coordinate client onboarding and account servicing processes
- Assist with various operational workflows
- Maintain client records and CRM accuracy/synchrony

Operations & Administrative Support

- Manage calendars, meeting logistics, and internal priorities
- Support implementation and refinement of firm processes
- Assist with project tracking and workflow management
- Help maintain office organization and team efficiency

Compliance & Business Support

- Assist with compliance-related administrative processes
- Maintain required documentation and records
- Support audit preparation and recurring reporting activities

Qualifications

Preferred:

- 2-5+ years of experience in executive support, client service, wealth management operations, banking, insurance, or professional services
- Strong organizational and communication skills with proficiency in Microsoft Office suite.
- Ability to manage multiple priorities with attention to detail
- Professional presence and strong follow-through
- Comfort with technology and learning new systems

Bonus Experience:

- Financial planning & wealth management and/or RIA experience
- CRM experience (Redtail, Wealthbox, Salesforce, etc.)

- Schwab, NFS, eMoney, Orion familiarity

Licensing Requirements:

- None, but Series 7 & 65 (or 66) is a plus.

What Success Looks Like

Within 12 months, this person becomes a trusted operational partner who creates a seamless client experience, improves internal efficiency, and gives advisors more time to focus on business development, planning and relationships.

Employee Benefits

- Competitive salary + bonus opportunity.
- Immediate access to SIMPLE IRA plan with a 3% company match.
- 2 weeks (Year 1) of paid vacation/personal/sick days, in addition to all Federal holidays.
- Free personal financial planning & investment management.
- Healthcare coverage negotiable.

Compensation Ranges

Experience Level	Year 1 Salary	Year 2 Salary
Entry Level	$40,000	$45,000 plus bonus eligible
Strong Administrative Experience	$50,000	$55,000 plus bonus eligible
RIA/Wealth Management Experience*****	$55,000	$60,000 plus bonus eligible

***** Candidates with significant RIA and/or Wealth Management experience, specialized skills, or exceptional qualifications may be considered for compensation outside of these ranges.