

**Job Title:** Office Facilitator

**Location:** On site – Birmingham, AL

**Hours:** Flexible 30-40 hours/wk.

### **Job Description**

This is an exciting opportunity to join a vibrant team in a collaborative and expert-driven atmosphere. You'll gain valuable experience working alongside industry leaders, while also having the chance to develop your skills and contribute directly to the success of the office.

As our Office Facilitator, you will play a versatile role. You will be responsible for creating a positive first impression for our visitors and guests, while also providing essential office support and handling administrative tasks.

### **Day-to-Day Responsibilities include:**

- Opening and closing the office
- Providing a warm and welcoming greeting to clients and visitors
- Managing incoming and outgoing mail
- Ordering and maintaining office supplies
- Preparing and binding presentation materials
- Overseeing the upkeep of conference rooms and public areas
- Confirming and coordinating client meetings
- Utilizing the electronic filing system to store and organize documents
- Assisting with planning and organizing company events
- Coordinating office facility maintenance
- Handling social media postings and website updates
- Maintaining accurate logs for internal tracking and compliance purposes
- Sending email blasts and managing communication through our CRM system

### **Our ideal candidate should possess the following skills and attributes:**

- Ability to provide a warm, welcoming, and positive experience for clients and visitors.
- Strong organizational skills with the ability to manage multiple tasks efficiently.
- Exceptional attention to detail in all aspects of work.
- Excellent written and verbal communication skills.
- A team player with a collaborative and helpful attitude.
- Proficiency in Microsoft Office Suite (Word, PowerPoint, Excel, Outlook, TEAMS).
- Self-motivated and able to work independently with minimal supervision.
- High ethical standards and the ability to maintain confidentiality, particularly with sensitive financial information.
- A strong sense of professionalism in both interactions and work habits.
- Strong problem-solving abilities with a flexible, adaptable approach to challenges.

**What would make you stand out above the rest?**

- Experience using Salesforce CRM is a plus, but not required
- Experience with Word Press is a plus, but not required
- Experience with social media management and marketing strategies is a plus, but not required

**Experience:**

- A minimum of two years of experience as an Administrative Assistant, Office Coordinator, or similar role with relevant administrative experience.

**We offer:**

- Competitive pay based on experience and skillset
- Annual bonus program, based on firm profitability and individual performance
- Full-time employees are eligible for benefits including Health, Vision, Dental, 401(k) plan with employer match, PTO, Life and DI Insurance, and more.

**About the Firm:**

Porter White & Company is a leading independent investment management and investment banking firm, located in Birmingham, AL.

We have been providing advice on financial decisions for businesses, institutions and families for 50 years.