



Title: Office Coordinator
Classification: Full-time non-exempt; Onsite
Department: Operations
Reports to: Director of Operations

Objective: Be the director of first impressions and offer invaluable support to the team by providing excellent organization and administrative support.

FP Transitions Introduction: At FP Transitions, our team of more than 60 professionals helps independent financial advisory firms identify, build, and realize value. We value innovation, collaboration, client-centricity, and objectivity. We are entrusted with mission-critical moments and drive life-altering business decisions.

Role Summary: As the Office Coordinator at FP Transitions, you will be the director of first impressions. Although this role occupies the front desk, it is much more than a receptionist. You will be a key liaison between our valued clients and consulting teams, the keeper of office culture, and a master of behind-the-scenes organization and execution.

Your primary responsibility will be to act as the central hub for the FP team, keeping us organized and effective. Essential skills for this role are communication, organization, and critical thinking. You will work with Salesforce, OnceHub, Tableau, and other tech platforms as adopted by leadership.

As this role is often our client's first stop, you will act as a reliable point of contact for our clients, providing vital support and maintaining clear communication and smooth handoffs. You will champion excellence and provide reliable vital support on behalf of the firm, serving as an essential contributor to the team. This is a highly valued position at FP Transitions, and we look forward to the right person joining our outgoing team.

Essential Functions:

- **Client Point of Contact:** Serve as the first contact for clients, providing timely and professional assistance to address their inquiries and concerns. Client contact will come via email, Zoom phone, or occasionally in person.
- **Manage Supplier Relationships:** Manage relationships and orders for IT, catering, office building, office supplies, shipping, and kitchen supplies.



- **FP Team Culture:** Work closely with the Operations and HR teams to plan company events and support new hires, HQ staff, and remote workers. You will also be the keeper of snacks and help maintain the office space.
- **Staff Augmentation:** Provide valuable backup support for departments with ad hoc tasks requiring a bit more staff and organization.
- **Departmental Coordination:** Collaborate closely with our Consulting and Business Development teams to ensure a seamless transition for clients.
- **Timely Communication:** Maintain open and transparent communication with clients and the FP team, promptly providing updates on their progress and addressing any inquiries or concerns.
- **Issue Resolution:** Identify and address potential issues or roadblocks that may arise during the client's or FP team's journey, working proactively to find solutions.
- **Maintain accuracy:** Ensuring records of client interactions and relevant data are complete and accurate in the customer relationship management (CRM) software.
- **Client Satisfaction:** Continuously monitor and evaluate client satisfaction per leadership guidelines, seeking feedback to enhance our services and achieve client retention goals.
- **Inventory:** Track and maintain inventory, including technology, office supplies, new hire gift boxes, etc.
- **Learn and leverage our technology platforms** to succeed and facilitate troubleshooting for clients and our team.

Preferred knowledge, skills, and abilities:

- Solid computer skills, including MS Office and ability to use Excel & PowerPoint
- Experience with tech platforms such as Salesforce, HubSpot, Tableau, and Zoom is strongly preferred.
- Well-organized and detail-oriented; can coordinate over multiple time zones and has demonstrated the ability to manage multiple tasks, prioritize responsibilities, and maintain meticulous attention to detail.
- Exceptional communication and writing skills, maintaining strict confidentiality when appropriate.
- Exceptional time-management and organizational skills.
- A proactive and solution-oriented mindset, capable of identifying challenges and implementing effective solutions.



Education and Experience:

- BSc/BA is preferred.
- 3+ years' experience in hospitality, project management, office management, or related customer service industry is strongly preferred.
- Experience in the wealth management/financial services industry is strongly preferred.

Compensation and Benefits:

- \$20-24/hour DOE
- Company lunches, snacks, and team-building events
- Medical, Vision, Dental, 401k with 25% employer match.
- Company holidays (including employee's birthday) and accrued PTO.

Physical factors & working conditions: Professional office environment, onsite, minimal travel required.

