



**OLV**  
INVESTMENT GROUP

## **Client and Culture Assistant**

At OLV Investment Group you will discover the driving force of our company is honesty and ethics. What we think is best for our clients and our staff will always be paramount to personal or corporate profit. As a company, we work as a team – not as individuals- drawing from the energy and skills of each other. Rooted in history and faith, OLV has been blessed with many gifted individuals who share a common mission of INVEST INCREASE IMPACT in the marketplace as we engage with our clients, community, and one another.

The Client and Culture Assistant at OLV Investment Group is an integral part of our team serving as the true connection between our clients, and the entire team. This great communicator, influencer and enthusiastic person will support the vision, positive culture and team spirit across our firm and clients.

The key role of this position is to engage and support the overall success of many different projects and initiatives and by working side-by-side with our Advisory and Client Services teams. The Client and Culture Assistant focuses on team engagement, client experience, and project managing assignments. This individual enjoys and excels at managing the day-to-day culture of the office.

## **Client and Culture Assistant Qualifications**

### **Experience and Education:**

- One to two years administrative training or equivalent work experience preferred
- Must be a US citizen or Permanent Resident only

### **Skills and Knowledge:**

- Excellent interpersonal skills with a client first mentality
- Cooperative in a team environment
- Exceptional communication capabilities, verbal and written
- Work with an eye for detail and accuracy
- Ability to follow directions and work independently; take ownership of assigned tasks, and think for themselves
- Effective and efficient administrative, time management, and organizational skills
- Ability to prioritize multiple tasks and anticipate potential problems

Disclosure – Above list of responsibilities of job description is not all inclusive. Job responsibilities and duties can and will change over time. Open and real time communication will be necessary between employee and supervisor.



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## **Client and Culture Assistant Job Description**

### **Client and Firm Engagement:**

Lead in alignment with OLV Core Values of Grace, Growth, Grit, and Generosity.

- Willing to encourage all those in the office with love and care.
- Attend all Cultural Events during office hours and outside of office hours when scheduled.
- Terrific Tuesdays – ordering food, setting up food, serving food if needed, restocking food, cleaning up.
- Help with office food and snacks – ordering, unloading groceries, keeping refrigerator and pantry clean and organized.
- Assist with all internal events – planning, preparing, executing.
  - Team building events, birthday parties, retirement lunches, other celebrations, holiday events, service projects/trips, office trips
- Assist with internal training events or meetings when applicable.
- Manage, answer, and oversee telephone procedures
- In Office Client Experience:
  - Greet clients and community members when they arrive to the office with a smile and friendly conversation.
  - Set up office or conference room for client meetings.
  - Office appearance maintenance and cleanup.
- Collect, open, and disperse mail
- Input notes into CRM for full documentation of service and keep accurate records of information.
- Book travel for employees when needed, handling all arrangements.
- Take minutes for staff meetings.
- Stay up to date on technology programs within the OLV office (CRM, Microsoft Office, etc.)

### **Advisory Support:**

- Schedule client reviews, work with advisors to coordinate schedules, timelines, and communication
- New Client Onboarding and Marketing Support
  - Marketing packets printed and available for all advisors
  - New Client Welcome gift sent out
- Preparing and sending out all blessing boxes, cards, etc.
- Communicate via phone/email/hard copy mail when needed to complete miscellaneous processes and service requests for clients.
- Print paperwork for in office meetings

### **Compliance:**

- Keep blotters up to date with Broker Dealer and RIA

**Location:** Livonia, MI

**Travel:** Up to 20% of the time between office and event locations

**Full / Part-time:** Full Time

**Hours Per Week:** 40 hours Minimum

**Shift:** 1st Shift

**Salary:** \$40-\$45k Annually

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