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Job Title: **Office Manager**

Company: Chesapeake Investment Planning LLC

Location: Stevensville, MD.

Salary Range: \$42,000 - \$55,000 + Periodic Bonuses

Benefits: Paid Time-off, Retirement Plan, Other..

Work Hours: Monday - Friday, 9:00 AM - 4:00 PM

About Chesapeake Investment Planning:

Chesapeake Investment Planning LLC is a certified independent financial advisory firm committed to helping individuals achieve their financial goals. Our mission is to provide the highest quality of information, service, and products to support our clients in realizing their dreams. We believe in building strong relationships with our clients, offering education and support, and maintaining a work-life balance for our team members.

Responsibilities:

- Assist in managing paperwork, including client reports and documentation.
- Process distribution payments to clients efficiently.
- Handle day-to-day activities related to client accounts.
- Wear multiple hats to manage and maintain the office environment.
- Collaborate with team members to ensure seamless operations.
- Support our commitment to client education and frequent communication.
- Managing incoming and outgoing calls, messages and emails.
- Scheduling

Requirements:

Education: A college or associate degree is preferred but not required; equivalent experience or relevant certifications will be considered.

Effective and Accurate: Demonstrated ability to perform tasks with a high level of accuracy and efficiency.

Hard Working: A strong work ethic with a commitment to completing tasks promptly and effectively.

Positive and Friendly Attitude: A positive and friendly demeanor when interacting with colleagues and clients, fostering a welcoming and collaborative atmosphere.

Strong Focus and Work Ethic: The ability to maintain focus on tasks and responsibilities, with a dedication to achieving both personal and team goals.



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Our Process:

The ideal candidate will provide support to our Certified Financial Advisors throughout our client processes which include:

- Discovery: Understand our clients' financial objectives and needs.
- Strategy: Develop customized, long-term investment strategies.
- Implementation: Efficiently put investment strategies into action.
- Monitoring & Adjusting: Continuously monitor and adjust strategies as needed.

Why Join Us:

- Competitive salary with periodic bonuses.
- A supportive and flexible work environment.
- Opportunities for career growth and development.
- Work-life balance is a core value.
- Engaging social events to foster relationships.
- Additionally, this role may involve other duties and tasks as well as occasional additional obligations that contribute to the smooth operation of our office and the satisfaction of our clients.

This opportunity is ideal for early-career professionals and experienced individuals seeking flexibility. If you are looking to take your career to the next level in a company that values both professional and personal growth, Chesapeake Investment Planning LLC is the place for you.

Learn more about us at Chesapeake Investment Planning Website. [Click Here](#)

Join us in helping clients achieve financial success while enjoying a fulfilling work-life balance. Apply today to be a part of our dedicated team!

Chesapeake Investment Planning LLC is an Equal Opportunity Employer.