



## Job Posting

**Position:** Director of First Impressions

**Accepting Candidates:** October 12, 2020 to October 26, 2020

**Location:** Lincoln, NE

### Job Summary:

Pittenger & Anderson, Inc. is a fee-only Registered Investment Advisor (RIA) based in Lincoln, Nebraska that provides investment management and comprehensive financial planning services. Our firm has been named to the CNBC Financial Advisor 100 List the past two years (2019 and 2020).

As the Director of First Impressions, you will be the first person at P&A that most clients and prospective clients will encounter, either via the phone or walking through the front door. You will also play an important role in helping to develop and execute marketing and outreach activities to clients and prospective clients. As part of the P&A team, you will be involved in Business Development and Strategic Planning meetings. We have an open office and view collaboration as one of our key differentiators.

### Job Duties:

The Director of First Impressions position is more than answering phones and greeting guests to our office. In addition to these two critical tasks, some of your responsibilities will include, but are not limited to:

- In partnership with our advisors, proactively think of ways to WOW our clients
- Facilitate our quarterly account review process and client report card generation
- Have a foundational knowledge of our portfolio management software (Tamarac)
  - Run daily, weekly, and monthly reports and other reports as needed
- Scan and file trade tickets and fee statements
- Maintain general office aesthetics – ensuring the office is clean and presentable and conference rooms are prepared before client meetings
- Develop and aid in the development of marketing materials, email and on-line marketing campaigns, and other ways to engage our clients and prospective clients
- Order office, bathroom, and kitchen supplies as needed

### Preferred Experience & Qualifications:

- Associates or bachelor's degree, preferably with an emphasis in business, finance, or marketing
- Series 65 exam to be passed within 120 days of initial hire

### Desired Skills Sets & Abilities:

- Professionalism and confidence
- Engaging and sociable
- Positive and energetic
- Proactive and self-motivated
- Good communication skills – in-person, over the phone, and via email
- Proficiency in Microsoft Excel, Word and PowerPoint
- Ability to adapt to new technologies and enhance existing technology to increase efficiency
- Proficiency in online marketing tools--Google Ads, Twitter, and other marketing platforms--is a plus.

**Salary:** Negotiable and based upon experience and desired skills and qualifications

**Benefits:** In addition to a competitive salary, P&A offers these additional employee benefits:

- Company retirement plan
- Bonus and Incentive Pay Programs
- Paid vacation and sick time
- Major holidays off
- Healthcare insurance

You can apply through our Indeed.com job posting or by emailing your resume and cover letter to Jon Sevenker (jon @ pittand.com).