



13809 Research Blvd, Suite 6545, Austin TX 78664  
512-342-7062

## **Job Title**

Office Administrator (Part-Time – Hybrid)

## **Essential Job Functions**

The Office Manager oversees a range of clerical and data-oriented tasks. On a given day, the Office Manager will:

- Communicate directly with clients in response to questions or service requests
- Establish and maintain client investment accounts at our custodian, Charles Schwab
- Review and update client information across multiple platforms
- Assist with creating financial plans within eMoney, our financial planning software
- Assist with generating invoices, receipts, and financial reports

## **About Us**

Southwest Retirement is a registered independent advisor that provides comprehensive financial planning and investment advisory services on a fee-only basis. We welcome employees who are committed to acting as morally and ethically responsible members of our profession and our broader community.

## **Required Qualifications**

- Experience with the Microsoft Office suite, particularly Excel, Word, and Outlook
- Excellent organizational and interpersonal skills
- Bachelor's degree or higher

## **Preferred Qualifications**

- Experience with or interest in developing a career within the financial services industry
- Series 65 license or comparable
- CFP® coursework and/or certification

## **Compensation**

- Starting wage: between \$48.00 and \$55.00 per hour, depending on experience
- Starting hours: 15 per week, 50% or more in-office

## **Benefits**

- SIMPLE IRA retirement plan with 2% company contribution
- Health insurance coverage
- Paid time off (accrued monthly)
- Paid time off for stock market holidays
- Flexible schedule set by employee

## **To Apply**

Please submit a résumé and brief cover letter to: [jmcglothlin3@swretirement.com](mailto:jmcglothlin3@swretirement.com)