

CPAlliance™

POWERED BY  CPS Investment Advisors

CPAlliance™ Administrative Assistant

Are you a methodical, detail-oriented individual who enjoys focusing on tasks? Do you appreciate individual recognition for your accomplishments? Are you looking for a harmonic work environment and stable employment with a “Best Place to Work” company? If yes, read on!

About CPS Investment Advisors

At CPS, we're more than just a workplace — we're a family. Year after year, we're honored to be recognized as one of Central Florida's premier places to work. Nestled in downtown Lakeland, at the heart of Central Florida, we offer not just a job, but a thriving, supportive community. Our dedicated team consistently strives for both personal and professional growth, ensuring that when you join CPS, you're not merely entering a new position; you're becoming part of a storied tradition.

More than our commitment to excellence, we are deeply rooted in our community. Our professionals passionately engage in philanthropic efforts, pouring their expertise and time into causes that make a tangible difference. As a member of the CPS family, you'll also have the opportunity to partake in these charitable endeavors.

And beyond the professional sphere, our prime location is a gateway to some of Florida's most iconic attractions — from the magic of Disney World to the serene beaches and exhilarating cruises. Join us, and embark on an adventure of growth, community, and unparalleled opportunities.

About the CPAlliance™

The CPAlliance™ is a Turnkey Asset Management Program (TAMP) designed by CPAs, for CPAs. It is an elite network of CPA Financial Planners who are registered investment advisors, uniquely qualified to help clients achieve and protect financial independence.

Job Purpose

Assistant to the CPAlliance™ Director. Tasked with aiding the Director in various capacities, including managing their schedule, email correspondence, and preparations for meetings, trainings, and speaking events. Additionally, will assist in guaranteeing that communications are meticulously reviewed and adhere to compliance standards prior to being published. Reports to the CPAlliance™ Director.

Job Duties

- **Provides administrative support to the CPAlliance™ Director to ensure efficient operation of the CPAlliance™ office.**
- **Answers phone calls, monitors email, schedules meetings, and ensures the Director's calendar is up to date.**
- **Carries out administrative duties such as filing, typing, copying, binding, scanning, and document review.**
- **Makes travel arrangements for the Director as needed such as booking flights, cars, hotel rooms, or restaurant reservations.**
- **Exhibits polite and professional communication via phone, e-mail, and mail.**
- **Maintains supplies inventory by checking stock to determine inventory level, anticipating needed supplies, and placing orders through the Brand Director.**

Skills & Qualifications

- **HS Diploma required. Bachelor's degree in business preferred.**
- **Has a strong and professional heart for service.**
- **Outstanding Written and Oral Communication Skills.**
- **Strong Computer Skills and Proficiency with Microsoft Office.**
- **Organizational Skills; Multitasking; Time Management.**
- **Investment advisory-related experience is preferred.**

Compensation & Benefits | What's In It For You

- **We offer a competitive base salary depending on experience and certifications.**
- **Be employed by one of Central Florida's best places to work.**
- **We ensure a healthy work/life balance.**
- **We believe in giving back to the community, offering numerous community service opportunities for you to make a difference.**
- **We care about your future too. Our generous 401(k) plan includes a 50% match to the maximum allowable contribution.**
- **Additional benefit highlights include health, dental, vision, and long-term disability insurance, escalating paid vacation, paid sick time, paid holidays, employer-paid life insurance, employer-paid CPE, and team goal bonus.**

What's Next?

If you're ready to take the next step in your career and be part of a team that values your growth and success, don't hesitate to apply for the CPAlliance™ Administrative Assistant position at CPS. Send your resume to Susan Starr at Susan@cpsinvest.com and take our 7-minute survey below. We can't wait to welcome you aboard!

<https://surveys.cultureindex.com/s/Oq2VWnBAgv/87164>