Amazonia Wealth Management, a mission driven financial services firm, is seeking a motivated, energetic full time Administrative Assistant.

Amazonia Wealth Management is a Brooklyn-based wealth management firm which focuses 100% on socially responsible/impact investments for individuals and families. The practice concentrates on environmental portfolios, and cruelty-free/animal welfare portfolios. Amazonia Wealth is piloting the first regenerative portfolios available for individual investors, which will offsets 1.5-2x the carbon footprint through a direct reforestation project in the Amazon.

Laid back, dog-friendly office in Williamsburg, BK co-working space, with days in Kingston, NY. Working remotely part-time is negotiable. Competitive salary and benefits. Significant opportunities for advancement as the practice grows, with preference given to candidates with a background in political/community activism, progressive politics and/or social work.

Key responsibility is to support the President and Founder in day-to-day administrative and miscellaneous tasks, including but not limited to:

Primary Duties, 75%

1. Management of all records and files. 25%
2. Organizing master calendar for both Founder’s travel schedule and all compliance/ financial deadlines. 25%
3. Personal assistant type duties for clients and founder as needed. 25%

Other Duties, 25%:

1. Data preparation and measurement of portfolios for carbon offsetting program.
2. Preparation of financial reporting, note-taking, and follow-up for client and meetings.
3. Coordinate and supervise various 3rd party vendors such as bookkeeping/compliance/IT.
4. Miscellaneous office management – ordering supplies, keeping any office equipment in good working order.

Qualifications:

1. Utmost discretion and loyalty.
2. Exemplary recordkeeping and organizational skill.
3. Diplomacy and a sense of humor.
4. Problem solving ability with little supervision.
5. Ability to work solo, and in a two-person office.
6. A spiritual, healthy relationship to money, along with financial acumen.
7. Excellent people skills - compassion and empathy for clients, and their varied approaches to their financial resources.
8. A clean credit report and criminal background – background checks will be performed.
9. Bachelors’ Degree.