

Position Title: Administrative Assistant
Location: New York, NY (Manhattan 7th Ave & W 34th St.)
Position: Hybrid – In office 3 days/week
Employment Type: Full Time
Hours: Monday-Friday; 9am-6pm



www.wallstreetag.com

Job Summary

Wall Street Alliance Group is seeking a highly organized, detail-oriented Administrative Assistant to support our growing fiduciary financial planning practice. This role is ideal for a professional who thrives in a fast-paced office environment and takes pride in delivering exceptional administrative and client support. The Administrative Assistant will play a key role in daily office operations, client onboarding support, scheduling, and internal coordination—helping ensure our team delivers a seamless, high-quality experience to the physicians and families we serve.

About Us:

Wall Street Alliance Group is a nationally recognized wealth management firm headquartered in Manhattan, New York. The firm operates in a Fiduciary capacity serving high net worth clients. Wall Street Alliance Group has a team of advisors with expertise in areas such as Tax Planning, Estate Planning, Asset Protection, Portfolio Management, 401(k) plans, Defined Benefit plans, Special Needs planning, Physician Financial planning, and Trust services. Please visit www.wallstreetag.com.

Responsibilities:

- Maintain and systematically organize office files, records, and client documentation
- Coordinate calendars, meetings, and appointments for advisors and leadership
- Prepare, format, and edit documents, reports, and presentations
- Answer incoming phone calls and route inquiries professionally
- Assist with data entry and ongoing database management
- Support new account openings and client onboarding
- Assist clients with DocuSign, online account access, and administrative follow-ups
- Provide general administrative support to team members as needed
- Book travel arrangements when necessary
- Performs other duties and responsibilities as assigned.

Qualifications:

- Minimum of 1 year administrative support or operations experience preferably within financial services
- Strong attention to detail, communication, problem-solving, and analytical skills
- Ability to multi-task under pressure, work independently, and work in a team environment
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and other office tools.
- Provide a high level of customer service.
- Analyzing to be able to research account information.
- Organize, manage, and track multiple detailed tasks and assignments with frequently changing priorities and deadlines in a fast-paced work environment.

- Handle stressful situations and provide a high level of customer service in a calm and professional manner.
- Use appropriate interpersonal styles and communicate effectively, both orally and in writing, with all organizational levels.
- Languages: Urdu, Punjabi, Gujarati and/or Hindi preferred

Additional Details:

- Annual salary of \$70,000-\$120,000 commensurate with experience
- Hybrid role, Minimum 3 days in the Manhattan office (7th Ave and W 34th St.)
- Benefit Eligible: Group health, vision dental plans, 401k retirement with employer contribution, Paid vacation, sick, and holiday hours
- Opportunities for professional growth and development; including continuing education.
- A supportive and inclusive work environment where your contributions are valued.

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