

## **Advisor Support Assistant**

[www.chukwumafinancial.com](http://www.chukwumafinancial.com)

### **Financial Advisory Practice – Tracy, CA (Onsite)**

**Schedule:** 28–30 hours per week

- Generally, 9:00 AM – 5:00 PM (Mon–Thurs) and half-day Friday
- Onsite in Tracy, CA (remote or hybrid arrangements are not available)
- This role is designed for a long-term professional seeking stability and growth within a boutique financial planning practice

### **Role Description**

The Advisor Support Assistant role at the Branch office of Christian Chukwuma, MBA, AIF®, BFA™ - dba Osaic Wealth, Inc., Member FINRA/SIPC, is a part-time, on-site position based in Tracy, CA. The primary responsibilities include assisting advisors with client service-related tasks, maintaining accurate client records, supporting client communications, and delivering quality customer service. Additional tasks may involve providing technical support and troubleshooting for internal systems and platforms. The role requires strong organizational skills and the ability to manage multiple priorities efficiently.

### **Company Description**

Osaic Wealth – Branch Office of Christian Chukwuma, MBA, AIF®, BFA™ is a boutique, independent financial planning practice serving individuals, families, and small business owners in Tracy and surrounding communities. As a fiduciary practice, we place clients' interests first and operate with integrity, professionalism, and discretion. We value structure, accountability, and thoughtful communication. Our team environment is collaborative, focused, and purpose driven.

This role offers an outstanding opportunity for individuals who seek purposeful work, appreciate a structured professional environment, and wish to contribute to a practice that significantly influences clients' lives.

### **Key Responsibilities**

- Greet clients and maintain a professional front-office presence
- Manage calendar scheduling with precision and attention to detail
- Prepare, review, and process client documentation

- Track paperwork and maintain organized electronic filing systems
- Assist with compliance-related administrative workflows
- Support client service follow-ups and communications
- Coordinate routine office operations and logistics
- Maintain strict confidentiality of sensitive financial information
- Other duties as assigned

## **Qualifications**

- Minimum of 3 years of operations or administrative support experience, preferably in financial services.
- Proficiency in computer applications such as Adobe Acrobat Pro, CRM systems, and Microsoft Office Suite (Windows, Word, Excel, PowerPoint).
- Strong Interpersonal Skills and excellent Customer Support abilities
- Expertise in delivering Customer Satisfaction and maintaining effective Communication
- Proficiency in Technical Support and problem-solving capabilities
- Ability to prioritize tasks and perform in a detail-oriented environment
- Previous experience in financial services or client service role is a plus
- Ideal candidate is proactive, highly organized, and takes ownership of their role

## **COMPENSATION & BENEFITS**

**Compensation:** \$24–\$26 per hour (based on experience) + Quarterly Bonus opportunities

**401(k) Retirement Plan** Traditional (pre-tax) and Roth contribution options

### **Paid Time Off (PTO) & California Sick Leave**

- Paid Time Off & California Sick Leave are provided in accordance with California law.
- Benefits and PTO policies are administered in accordance with company policy and may be updated from time to time, consistent with applicable law.
- We are an equal opportunity employer and value diversity at all levels of our organization.