

## BALENTINE LLC

Balentine LLC, is a Registered Investment Advisor with a history of over 30 years of experience providing un-conflicted wealth management services to high net worth, endowment & foundation, and family office clientele. Based in Atlanta, Georgia, with offices in North Carolina and a presence in Tennessee as well, Balentine is an independent, employee-owned firm serving the investment and risk management needs of a sophisticated group of clients. At present, Balentine is comprised of approximately 30 individuals collectively working on an asset base of over \$2.5 BB with significant growth potential beyond its present foundation for clientele with liquid assets in excess of \$5MM.

The firm has been at the forefront of the move toward fee-based rather than transaction-based advisory services as well as a proponent of the open architecture investment solutions across all asset classes on a fully discretionary basis. There is a deeply rooted belief that this approach is the only way to provide completely objective and unbiased investment advice. The firm's independence - combined with the fact that its partners and employees have substantial personal assets invested with the same managers and on the same terms as clients - provides stability and the proper alignment of interests. A holistic approach to each client's total balance sheet is taken so that investments may be tailored to achieve the appropriate risk-adjusted return.

Since its original founding as Balentine & Co. in 1987, integrity, exceptional client service, and investment excellence have been hallmarks of the firm. These principles were carried forward when the firm became part of Wilmington Trust in 2002, and remain the foundation for the firm re-established in 2010 and once again independent Balentine LLC, which brings together a cohesive team of professionals with years of previous experience working together. The firm is actively seeking to grow its business and recruit like-minded professionals to assist in its expansion.

# Receptionist

## Executive Summary

Often referred to as the VP of First Impressions, the receptionist serves as the initial point of contact for all who interact with Balentine and sets the tone for the Balentine experience. The receptionist must be proactive, efficient, and display a high level of professionalism and confidentiality at all times. The receptionist is responsible for ensuring that all our guests, in-person and on the phone, are taken care of in a caring and timely manner.

As part of the Finance and Administration (F&A) team, the receptionist works closely with the Chief Financial Officer (CFO) and the controller. It is imperative that the receptionist be well organized and able to work autonomously on these additional responsibilities while maintaining the high service standards expected of the receptionist.

## Outcomes

We expect the Receptionist to, with training, perform the following responsibilities. The ideal candidate will understand that a great attitude and efficiency in technology and task management will be key drivers for success.

## Core Receptionist

- 1) Open office doors and roll phones promptly at 8:30 each morning; keep lobby area neat and tidy
- 2) Operate a multi-line telephone console, answering all calls within three rings and routing callers to the appropriate party
- 3) Review staff calendars and reset conferences each day to prepare for incoming guests
- 4) Greet all guests in lobby as they arrive, offer a beverage, and notify employees of their arrival; provide parking validations and any additional information as guests leave
- 5) Coordinate effectively with support staff and adhere to set schedules ( for lunch, mail runs, vacations, breaks, etc.) to ensure guests, including via phone, are always attended to in a timely and professional manner
- 6) Distribute and collect mail twice daily

- 7) Create and maintain standard operating guides related to the Receptionist role
- 8) Unload and load dishwasher at the begin and end of each day

## F&A Team Support

- 1) Provide administrative support to the F&A team, such as coordinating meetings, /ordering setting up for lunch meetings and storing documents in accordance with Balentine's filing system
- 2) Demonstrate efficiency in Balentine's invoice management system by entering bill information correctly and on time in accordance with the schedule
- 3) Assume ownership of and keep up-to-date records in the Vendor and Contract Database
- 4) Complete AMEX and expense reporting for CFO on time
- 5) Provide task-level project support on an as-needed basis (mass mailings, binding meeting materials)
- 6) Become cross-trained on other administrative support roles

## Competencies

While we acknowledge there can be multiple approaches to a job well-done, the below competencies outline some of the characteristics that we expect to contribute to the successes of the Receptionist position.

### ❖ Professional and Courteous

- *Ability to interact with all people in a polite manner and positive attitude*
- *Ability to have a positive impact on the people around you*

### ❖ Emotional Intelligence and Interpersonal Skills

- *Ability to read and connect with people and respond accordingly in varying situations*
- *Ability to recognize own and others' emotions and use to create positive interactions*

### ❖ Organized

- *Ability to structure responsibilities, tasks, and project management to eliminate wasted time and efforts*
- *Ability to manage multiple projects and competing priorities without missing deadlines*

### ❖ Calm Under Pressure / Unflappable

- *Ability to respond calmly and maintain performance standards in a busy office setting*

- *Ability to maintain high service standards and problem-solve effectively when faced with new challenges*
- ❖ **Flexible and Adaptable**
  - *Is unperturbed by changing priorities and conditions*
  - *Is capable of shifting concentrations throughout the day*

## Qualifications

- ❖ 3 years similar experience
- ❖ Expertise in Outlook required
- ❖ Proficient skills in the Microsoft Office suite required
- ❖ Experience with Box, Concur and Quickbase a plus

## Compensation

A competitive compensation package will be offered including an attractive base salary, a performance-driven bonus, and benefits. If interested, please send a cover letter and resume via email to [ceasterlin@balentine.com](mailto:ceasterlin@balentine.com). Please include your full name as well as the phrase "Receptionist - Atlanta" in the subject heading.