



---

## WD Wealth Strategies

---

Please Note: This job is being posted on behalf of WD Wealth Strategies ([willduffy.com](http://willduffy.com)) by Great Assistant (<https://greatassistant.com/>). Great Assistant is a company that works with entrepreneurs to match them to assistants.

WD Wealth Strategies is a holistic advisory and consulting firm that specializes in Tax Strategies, Alternative Investments, and Insurance Products. We provide comprehensive financial planning and tax strategies for accredited investors and business owners.

We are looking for a competent virtual assistant that encompasses our core values of Accountability, Honesty & Transparency to support our two Advisors/Relationship Managers; Michael Enyart and Nikita Gold. Some of your responsibilities will be scheduling and calendar management, monitoring tasks and workflows, tracking priorities, email and phone calls, processing new client engagements, interacting and following up with clients, data intake, electronic filing, team meetings, and a variety of other administrative tasks.

The ideal candidate will have the following skills and qualities:

- a problem solver who is always looking for ways to improve processes and efficiencies
- is proactive and strives to learn from mistakes
- a team player who is easygoing and has a positive can-do attitude
- enjoys having a full workload, is flexible and motivated, and has excellent multi-tasking skills
- is driven, enjoys a challenge, and always gives it their all to get the job done
- detail-oriented with strong writing skills, spelling, and grammar
- dependable, reliable, and accountable
- exceptional organization and communication skills
- is open to constructive criticism and is able to learn from it
- excellent memory and someone who takes excellent notes

- tech-savvy with the ability to learn new software quickly
- financial industry knowledge is helpful but not necessary as there will be complete on the job training

### **Experience with the following is a plus!**

- Google Workspace- All Google products
- Monday.com
- RedTail
- Adobe Acrobat Pro

### **Position Details**

- This position is a W2 Employee position.
- Benefits include: 401(k) - Company contributes 5% with no contribution needed, Fully Paid Annual Work Trip to Puerto Rico, Performance-based Annual Bonus
- A Company owned Microsoft Surface Pro will be provided for work purposes
- Full Time 40 Hours per week.
- Hours are 8:00 am - 5:00 pm MST with some flexibility
- Some Travel will be needed for our annual sun & fun weeklong trip to Puerto Rico
- You must be able to pass a background and fingerprint check
- We're looking for someone to become a long-term (3+ years) member of our team

### **How to Apply:**

Email: [jobs@greatassistant.com](mailto:jobs@greatassistant.com) (Please do not contact WD Wealth Strategies directly. Doing so will disqualify you for the position.)

In the subject line, please write, "Hi, I'm (your full name) from (insert your city & state). I'm interested in the WD Wealth Strategies Virtual Assistant position."

In the body of the message, please write me a 15 sentence email including:

- One sentence opening salutation that says: "Hi there! I'm (your name) from (city, state)."
- Paragraph #1: Reason(s) why you think this job is a good fit for you, including your experience as an administrative assistant (include the number of years of experience you have and if you have experience being an assistant for multiple bosses) and the type of tasks you handled. (black font, Verdana, 3 sentences)
- Paragraph #2: Tell us about a time you were proactive and use your problem-solving skills to solve and find a solution to a problem. (red font, Verdana, 3 sentences)

- Paragraph #3: Tell us about your follow-through skills and your experience with handling client inquiries through email and phone calls. (blue font, Verdana, 3 sentences)
- Paragraph #4: If you are/are not currently working (if you are working please let us know when you will be able to start this position if hired), where you see yourself in three years and how you would describe yourself in three words. (black font, Verdana, 3 sentences)

One sentence closing providing the following:

- a closing salutation including your name, email address, phone number, and the link to your LinkedIn profile if you have one.

Be sure to attach a resume. Thanks!