

**Job Title: Office Administrator/Client Concierge**

**Location:** Mechanicsburg, PA (In person)

**About Us:****Join a Team Where Excellence Meets Purpose**

LeTort Trust is a Private Trust Company providing comprehensive multi-generational wealth planning and streamlined retirement plan design and management for closely held businesses, individuals, and families. At LeTort Trust, we pride ourselves on fostering a culture of integrity, collaboration, and continuous growth.

**Job Description:**

LeTort Trust is seeking an energetic and motivated Office Administrator/Client Concierge to join its team in Mechanicsburg, PA.

The Client Concierge serves as a primary point of contact for clients and helps create a welcoming, responsive, and professional client experience. This position focuses on cultivating strong relationships, coordinating appointments, supporting client engagement initiatives, planning company events, and assisting with day-to-day client service needs. The ideal candidate is highly organized, personable, detail-oriented, and interested in developing the skills necessary to advance into positions with greater responsibility within the organization.

**Core Responsibilities:**

- Deliver a warm, professional, and personalized welcome.
- Serve as the initial point of contact by answering and directing telephone calls and ensuring timely and professional communication.
- Provide comprehensive administrative support, including assisting with correspondence, reports, presentations, document preparation, special projects, data entry, records management, and general office administration.
- Perform all responsibilities in accordance with company policies, regulatory requirements, and information-security procedures.
- Assist with client communications, marketing materials and client/community events.
- Demonstrate curiosity and a commitment to continuous learning by actively seeking to understand the services, fiduciary responsibilities, and operations of LeTort Trust through training, observation, and thoughtful questions.

## Qualifications:

- Bachelor's degree in business, marketing, communications, finance, or a related field.
- Prior experience in client service, financial services, marketing, or office administration.
- Strong interpersonal, communication, and relationship-building skills.
- Excellent organizational and time-management abilities.
- Professional appearance and demeanor.
- Strong attention to detail and commitment to accuracy.
- Proficiency with Microsoft Office, calendar-management systems, customer relationship management software, WordPress, and virtual meeting platforms.
- Ability to maintain strict confidentiality.
- Strong organizational, communication and interpersonal skills.
- Interested in building a long-term career within the wealth management industry.

## Why Join Us:

LeTort Trust offers a dynamic, supportive environment where innovation and professionalism are valued. We provide competitive compensation, professional growth opportunities, a comprehensive benefit package, and the chance to significantly impact our clients' financial and legacy planning. This role offers a clear path for professional growth. As you gain knowledge of our services and pursue relevant education, certifications or licensing when appropriate, you'll have opportunities for advancement. Our organization has a strong history of investing in employee development and promoting team members into increasingly advanced positions.

## How to Apply:

Submit your resume and cover letter to [HR@letorttrust.com](mailto:HR@letorttrust.com) with "Client Concierge" in the subject line.

*LeTort Trust has been serving the central PA market since 2002, providing business owners, executives and individuals with a wealth of experience in the retirement plan services, investment management and personal trust industries. For further information on LeTort Trust, please visit our website at [www.letorttrust.com](http://www.letorttrust.com).*

*LeTort Trust is an Equal Opportunity Employer and considers all qualified applicants regardless of race, gender, color, religion, national origin, age, sexual orientation, gender identity, disability, veteran status or other classification protected by law.*