

Administrative Associate

Van Liew Trust Company | Providence, RI | Full-time

About Van Liew Trust Company

Van Liew Trust Company is a Rhode Island based employee-owned trust company dedicated to helping clients achieve their long-term financial goals. We offer a collaborative, team-oriented environment where employees are encouraged to contribute ideas, develop professionally, and make a meaningful impact for the clients we serve.

About the Role

We are seeking a proactive, detail-oriented Administrative Associate to join our client service team. In this role, you will provide essential administrative and operational support to the Vice President of Administration and Administrative Specialists while helping ensure a responsive, polished, and reliable client experience. This is an excellent opportunity for someone who enjoys working with people, managing details, learning new systems, and contributing to a high-performing professional services environment.

What You'll Do

- **Deliver excellent client service:** Serve as a primary point of contact for clients by phone, email, and in person; respond to inquiries, resolve routine issues, and help build strong client relationships.
- **Provide administrative and operational support:** Assist the Vice President of Administration and Administrative Specialists with correspondence, client meeting materials, Investment Committee materials, SAGE G/L work, and quarterly board meeting reports.
- **Maintain accurate account records:** Process and maintain client account records and transactions, including fund transfers and other operational requests.
- **Use and learn key technology:** Work with client relationship management software, portfolio management systems, Microsoft Office tools, and other business applications.

What You'll Bring

- Strong analytical thinking and problem-solving skills.
- Excellent communication, conversational, and interpersonal skills.
- Exceptional attention to detail, organization, and follow-through.
- Adaptability in a fast-paced, client-focused environment.
- A collaborative, service-minded approach and a results-oriented work style.

- Strong proficiency with Microsoft Excel and Microsoft Office; experience with Wealthbox, QuickBooks, SAGE G/L, or accounting software is a plus.

Compensation and Benefits

- **Salary range:** \$42,500–\$50,000 annually, based on experience.
- **Benefits:** Full-time employees receive a comprehensive benefits package that includes paid medical, dental, basic life, and AD&D coverage, along with paid holidays, vacation time, and sick time.
- **Retirement:** Van Liew Trust Company offers a 401(k) retirement plan with an employer match to help employees plan for the future.

How to Apply

If you are interested in joining a collaborative, client-focused team, we encourage you to apply. Please submit your resume and a brief cover letter for consideration.