

# Office Manager

## Oglesby Wealth Strategies | Watkinsville, GA

At Oglesby Wealth Strategies, we help clients navigate their unique retirement paths with clear, understandable planning. We are seeking a proactive Office Manager to serve as our operational architect and the face of our firm. This role is designed for a "system-builder" who can manage a professional front office while simultaneously refining the internal workflows that allow our team to thrive.

**This position begins part-time (9:00 AM – 3:00 PM M-TH, with occasional Fridays) with a path to transition into full-time (9:00 AM – 5:00 PM M-F) as you take full ownership of office operations.**

### Primary Responsibilities

- **Workflow System Development:** Proactively identify bottlenecks in current processes and build/document Standard Operating Procedures (SOPs) to streamline client onboarding, meeting prep, and daily tasks.
- **Building Operations:** Act as the primary point of contact for facility management, including vendor relations (IT, maintenance, utilities), office procurement, and ensuring the physical environment is always "client-ready."
- **Reception & First Impressions:** Manage the front-office flow with a "Boutique Hospitality" mindset; greeting guests, managing phones, and directing all correspondence with warmth and professionalism.
- **Executive Support:** Protect the Founder's time by acting as a strategic gatekeeper, managing calendars, and filtering administrative "noise."
- **CRM & Data Stewardship:** Maintain the integrity of Wealthbox by managing all data entry with "get it right the first time" precision and assisting in the creation of basic reports.
- **Team Support & Event Coordination:** Lead the logistics for marketing events and community seminars, ensuring all physical materials and digital assets are organized and ready for execution.
- **Servant Leadership & Growth:** We are looking for an "owner-minded" partner who thrives on growth. While this role begins with foundational operations, it is designed to evolve into a leadership hub overseeing Human Resources, internal accounting, and strategic partnership communications as the firm scales.

### Qualifications & Core Competencies

- **System-Minded:** You don't just do a task; you ask, *"How can we make this a repeatable system?"*
- **Experience:** Proven experience in office management, front-office operations, or a role that required building internal workflows.
- **Technical Proficiency:** High competence in Microsoft Office/Google Suite and CRMs/EMRs (Wealthbox preferred). Minimum typing speed of 40 wpm.
- **Interpersonal Excellence:** A servant-hearted communicator who makes every client feel like a priority.

- **Organization:** The ability to handle sensitive financial information with total confidentiality and stay calm under pressure during busy seasons.
- **Physical Ability:** Ability to lift up to 30 pounds (event materials) and sit for extended periods.

## Compensation & Schedule

- **Job Type:** Part-time to start (25–30 hours/week) with a path to Full-time (35–40 hours/week).
- **Initial Schedule:** 9:00 AM – 3:00 PM, Monday–Thursday (with occasional Friday/evening events).
- **Growth Schedule:** Potential to move to 9:00 AM – 5:00 PM as you take on more operational leadership.
- **Work Setting:** In-person (Watkinsville GA 30677).
- **Hourly Rate:** Start at an hourly rate, with opportunity to move into a salaried position.

## Disclaimer

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required for the successful execution of this role. Duties, responsibilities, and activities may change, or new ones may be assigned, at any time with or without notice. College Planning Experts is an equal opportunity employer and does not discriminate on the basis of race, national origin, gender, gender identity, sexual orientation, protected veteran status, disability, age, or other legally protected status.

*The content provided in this document template is for general informational and educational purposes only. While Simplicity strives to ensure the accuracy and relevance of the information, this template is not intended to serve as legal, financial, or professional advice. Simplicity does not assume any responsibility for errors or omissions, nor for any actions taken based on the content provided. By using this template, you acknowledge and agree that you bear full responsibility for your decisions and outcomes.*