CORDA

TOGETHER WE'RE INVESTED

Company Overview

CORDA Investment Management, LLC is a client-centered wealth management firm serving high-net-worth individuals and families. We bring together investment management, financial planning, and tax strategy in one integrated, proactive approach.

Registered with the SEC under the Investment Advisers Act of 1940, CORDA upholds the highest standards of integrity and fiduciary responsibility.

At CORDA, our team shares a common purpose: helping clients navigate complexity, build confidence in their financial future, and leave a meaningful legacy. We are a close-knit, collaborative team. We support each other and welcome new ideas, while staying focused on the clients we serve. If our work resonates with you, we'd love to connect!

Administrative Assistant

We are seeking a highly organized, proactive Administrative Assistant to support a team of financial advisors and play a key role in delivering an exceptional client experience. This position sits at the center of advisor support and client coordination, ensuring that day-to-day operations run smoothly and that client relationships are consistently maintained.

This is a high-impact role with significant visibility across the team. You will partner closely with advisors to manage schedules, coordinate client interactions, and ensure follow-through on all client-related activities. Over time, this role has the opportunity to expand into deeper client service and operational responsibilities.

The ideal candidate is detail-oriented, responsive, and takes pride in ownership. You anticipate needs before they arise, stay highly organized, and are committed to ensuring nothing falls through the cracks.

Location: Dallas, TX

Position Type: Full-Time

Essential Duties & Responsibilities

- Manage calendars and scheduling for advisors, including proactive outreach to clients to coordinate meetings and reviews
- Serve as a central point of coordination for client-related activities, ensuring timely follow-up and communication
- Prepare for client meetings by organizing materials, taking notes, and tracking action items to completion
- Assist with client onboarding, account maintenance, and paperwork processing
- Coordinate with internal teams and external partners to support seamless client service
- Maintain accurate and up-to-date client records in systems such as Salesforce
- Utilize platforms including Outlook, Tamarac, Schwab Alliance, Microsoft Teams, Excel, and DocuSign in daily workflows
- Support ongoing organization of client relationships, including ensuring all clients are engaged and scheduled for regular reviews
- Contribute to a highly collaborative team environment, assisting where needed to support overall office operations

Education & Experience

- Bachelor's degree preferred
- 2+ years of experience in an administrative, client service, or support role
- Experience in financial services or wealth management preferred
- Proficiency with Microsoft Office (Outlook, Excel, Word) and comfort learning new systems
- Experience with CRM platforms (e.g., Salesforce) and financial tools (e.g., Tamarac, Schwab Alliance) is a plus
- Understanding of financial markets or investment concepts is a plus
- Progress toward or interest in obtaining licenses such as the Series 66 is a plus