



## Employment Application

### Contact Information

- First and Last Name: \_\_\_\_\_
- Street Address: \_\_\_\_\_
- Phone Number: \_\_\_\_\_
- Email Address: \_\_\_\_\_
- Are you legally eligible to work in the U.S.? ☐ Yes ☐ No
- Have you ever been convicted of a felony? ☐ Yes ☐ No

*If yes, please explain:*

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### Position Information

- Which position are you applying for?
  - ☐ Administrative Assistant
  - ☐ Client Services Associate
  - ☐ Open to any
- Available start date: \_\_\_\_\_
- Availability:
  - ☐ Part-time (under 30 hrs/week)
  - ☐ Full-time
  - ☐ Flexible

*If part-time or flexible, please specify:* \_\_\_\_\_

- Desired hourly wage (range optional): \$ \_\_\_\_\_ to \$ \_\_\_\_\_

### Education

- Current School or Most Recent Attended: \_\_\_\_\_
- Degree / Major / Year Completed: \_\_\_\_\_



### Experience

- **Do you have any prior office, administrative, or customer service experience?**  
☐ Yes ☐ No
- **Do you have experience with any of the following?** (Check all that apply)
  - ☐ Microsoft Office
  - ☐ CRM or database tools (*Please list:* \_\_\_\_\_)
  - ☐ Filing/scanning documents
  - ☐ Financial services or investment knowledge

*If you answered "Yes" to either question, please briefly describe your relevant experience:*

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### Short Questions

- **Why are you interested in this role and working in financial services?**

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- **What skills or traits make you a strong fit for this position?**

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### Please list 2 professional references:

Name: \_\_\_\_\_ Title/Company: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Name: \_\_\_\_\_ Title/Company: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_