



# Executive Assistant Job Description

<b>Department:</b>	Operations
<b>Reports To:</b>	Operations Manager
<b>FLSA Status:</b>	Exempt

## Job Summary

This position is responsible for a broad range of administrative tasks including high-level support to the CEO, CFO and CIO. They will keep the executive's communications organized so that they can easily access the most important information without having to sort through low-priority items. They will manage the executive's daily calendar, including scheduling meetings, confirming appointments, and preparing materials by performing the following duties.

## Essential Job Duties

- Frequently communicates and interacts with senior-level personnel, external collaborators, and contacts to assist with firm-wide and client specific objectives.
- Acts as a representative of executive leadership regarding internal and external relations and correspondences and screens communications.
- Ensures that executive leadership is informed of priorities and deadlines.
- Independently performs special projects.
- Responds to a wide variety of requests for information, policies and procedures, and executive action.
- Analyzes needs and problems and works collaboratively to determine approach and priority.
- Utilizes efficient time management with the nuances of complex administrative assistance at the executive level.
- Maintains confidentiality in all aspects of team and company information.
- Collaborates with the others to develop and follow best practices.
- Manages the CEO, CFO and CIO's communications and calendars as determined by the individual.
- Schedules client calls, visits, and meetings when necessary.
- Maintains COI relationships to include gift giving.
- Manages and maintains expenses for the CEO, CFO and CIO.
- Assists with CEO specific responsibilities to include managing the marketing department.
- Assists with CFO specific responsibilities as determined by the CFO.
- Assists with CIO specific responsibilities to include taking minutes for IC meetings.
- Prepares companywide travel arrangements.
- Performs other duties as assigned.

**Supervisory Responsibilities**

This position does not have any supervisory responsibilities.

**Qualifications**

Ability to perform essential job duties with or without reasonable accommodation and without posing a direct threat to the safety or health of employees or others. To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform essential duties.

**Education & Experience**

Formal education is not a requirement of this role. This position requires three years of related experience supporting executive(s) in a complex environment, preferably in financial services. An equivalent combination of education, training, and experience may be used to satisfy these requirements. Adaptable to new technologies, familiarity with CRM systems such as Salesforce Account Engagement Tool is preferred.

**Certificates, Licenses, and/or Registrations**

This position does require a Notary Public. Must be obtained within 90 days of hire.

**Travel Requirement**

This position does not require travel.

**Knowledge, Skills, & Abilities**

- The ability to pay close attention to accuracy and precision in work tasks.
- The ability to effectively convey information and ideas through written, verbal, and non-verbal means.
- The ability to provide excellent service and meet the needs of clients.
- The ability to make informed and timely decisions based on available information and critical thinking.
- The ability to develop and implement plans, set priorities, and manage resources to achieve goals.

**Physical Demands & Work Environment**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties of this job. The work environment characteristics described here are representative of those an employee encounters while performing the essential duties of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential duties.

- Prolonged periods sitting or standing at a desk and working on a computer.
- Must be able to occasionally lift, carry, push, and/or pull up to 20 pounds.
- Communicates regularly throughout the day via email, messages, and phone calls.
- Performs repetitive tasks such as typing or data entry.
- The typical noise level is moderate.

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Employer Representative:** \_\_\_\_\_ **Date:** \_\_\_\_\_