Executive Assistant

Are you great at anticipating needs? Do you enjoy solving problems with creative solutions? Do you take initiative and love ownership? We have the role for you!

We are a personal financial planning and investment firm based in the Seattle-Bellevue area, searching for an **Executive Assistant** to provide multifaceted and high-level support for one of the firm's advisors.

Who we are looking for:

This full-time position offers a unique opportunity for you to become an integral part of our small, dynamic company. The main objective for this position is to reduce or eliminate the administrative burden on the advisor, so that he can focus on the big picture: you will function as his right hand, freeing his time for the things he does best.

As a high-level assistant, you hold the high-level perspective in mind while attending to all the projects and tasks that support those larger goals and the firm's overall vision. To that end, you possess **exceptional organizational and research skills**, know how to **prioritize tasks**, and **manage time effectively**. You excel at **maintaining and streamlining organizational systems** and have **excellent written and verbal communication skills**. You **take pride in owning your work** and **coming up with innovative solutions to problems**. You **thrive on working independently**, both on daily routine tasks as well as new, innovative projects, but you're **also a team player who enjoys collaborating with staff**. With clients, you are **professional and poised**. You value and **embody integrity and honesty**, as you handle confidential and/or sensitive information daily.

If a stable, inviting, and upbeat work environment appeals to you and you appreciate and want to contribute to the positive culture of the firm, please apply today!

Key Responsibilities of the Executive Assistant:

- Research background material, collect and evaluate data and confidential client information, and prepare and update ad hoc reports.

- Monitor and maintain databases including a CRM.
- Prepare for and run team meetings.
- Complete portfolio reviews and other documents to prepare for client meetings.
- Delegate and monitor tasks related to client meetings
- Sort, and where possible clear advisor’s inbox.
- Review organizational systems and collaborate with the team to update and improve them.
- Handle client communications, including coordination of meeting schedules, appointments and visitor scheduling.
- Oversee routine and novel tasks, coordinate with staff members to ensure work is getting done in a timely and efficient manner, with priorities maintained.
- Assist with personal tasks including tax preparation, bookkeeping, appointments, travel arrangements, and personal organization.
- Answer phones, and other projects as needed.
- Personal and professional scheduling and calendar coordination.

What the Successful Executive Assistant will have:

- Bachelor’s degree & +5 years of admin experience.
- Previous financial services experience preferred.
- Proficient in all aspects of the Microsoft Office suite with strong Word and Excel skills, and ability to learn new software and technologies.
- CRM experience required, preferably Red Rail Technology
- Self-starter, problem-solver and goal-oriented team player.
- Able to respond in a timely manner, organize tasks, and adjust to changing priorities based on the needs of the firm.
- Excellent written and verbal communication skills with strong attention to detail and accuracy.
- Ability to work independently as well as effectively in a team environment.
- Strong interpersonal and relationship building skills.

- Self-confidence, professionalism, personal integrity and an understanding of fiduciary responsibility and regulatory procedures for financial services.
- Ability to maintain utmost discretion in working with sensitive and confidential information.

Overview of Our Firm:
Our firm is a small, highly successful financial services company based in the Seattle-Bellevue area. We are committed to providing unparalleled service to our clients, helping them to prosper through our attention to their financial needs and goals combined with in-depth investment research and cutting-edge strategies. It's our mission to offer a personalized, hands-on approach to a select clientele; thus we strive to be responsive and empathetic as well as trusted and knowledgeable.

Compensation:
$80,000 to $90,0000 annually

Outstanding Benefits Include:
- Competitive compensation
- Health, Dental, & Vision
- Life Insurance, Long Term Disability
- Educational fees for certification
- Parking or commuter subsidy
- Generous Paid Time Off
- 401(k) options
- Weekly restorative yoga
- Team building activities and appreciation events
- Optional in-office mind/body practices such as restorative yoga

We value employees' whole self, and strive to create a harmonious, enriching work atmosphere. Personality and "fit" are therefore as important as skills and work ethic. If this sounds like you, and you would like to be a part of this dynamic firm, we want to hear from you!

All Things HR is an external HR Consulting Company, assisting small to mid-sized business with their hiring process. To apply to the Executive Assistant position with our client, please submit your resume to jobs@allthings-hr.com.