

Executive Assistant

Description:

Our team is actively seeking an Executive Assistant for our Corvallis office. Our firm is comprised of fun, compassionate, community-minded individuals who love being part of a diverse and energetic team. A successful candidate must embody our values of treating all people with respect, never compromising our integrity, delighting our clients, and embracing our team culture. The ideal candidate must also be devoted to our commitment to care deeply about our clients and their financial lives.

Responsibilities & Activities:

- Ensure the Executive's end results are met
- Proactively manage the Executive's calendar, including making appointments and prioritizing the most sensitive matters
- Support the Executive by greeting clients, scheduling meetings, completing meeting preparation, answering phones, responding to emails, and providing other office support needs
- Prepare for client meetings in advance through coordinating with clients, completing client research, and printing corresponding materials
- Provide administrative assistance such as writing and editing e-mails, drafting letters, and preparing communications on the Executive's behalf
- Assist and coordinate with the Client Services Team for client paperwork and follow-up to ensure a seamless onboarding process for new clients
- Perform minor accounting duties such as expense and other necessary reports
- Organize team meetings, including scheduling, working with vendors, sending reminders, and organizing catering when necessary
- Prepare for and manage all travel related needs for Executive and team members when needed
- Manage the office space to ensure it is well kept, organized, and professional
- Manage the ordering of supplies for all company office locations
- Assist other team members with tasks as needed

Required Knowledge, Skills & Abilities:

- Minimum 2 years of clerical/administrative experience
- Previous Executive Administrative experience preferred
- Minimum 2 years of customer service experience

- Preference given to 1+ years of experience within the financial services or professional services industry
- Excellent organizational, time management, and detail-oriented skills
- Ability to handle competing priorities and multiple tasks
- Excellent interpersonal and communication (oral & written) skills
- Proficiency with computers
- Willing to travel to other company locations as needed

Benefits include:

- 100% Medical and Vision Premium Coverage
- Voluntary Dental Benefit
- Paid Time Off
- 10 Paid Holidays
- Paid Sick Leave
- 16 Hours of Paid Volunteer Time
- Paid Parental Leave Options
- Annual Bonus Plan
- Short-term and Long-term Disability*
- Life Insurance*
- 401k Plan*
- Cell Phone Reimbursement
- Cappuccinos for Life!

*Eligible after one year of employment