MOSAIC
FAMILY WEALTH

Executive Assistant

General Description

The Executive Assistant is a key part of the Mosaic Family Wealth team with diverse responsibilities covering administration, office management, and project management. The ideal candidate possesses a "friendly warmth" and "service-minded attitude" with a desire to serve as a concierge for the needs of our clients.

Responsibilities:

Administrative support

- Maintain executive calendars through Calendly and schedule meetings and calls
- Check voicemail and e-mail and identify appropriate response
- Answer the incoming phone calls and respond to simple requests
- Mail information to clients and follow up on data requests
- Maintain notes and records in Salesforce and Docupace
- Proofread correspondence and format documents – strong editing skills
- Other administrative responsibilities as needed

Office management

- Basic HR responsibilities
- Stock the office with supplies
- Manage shipment of packages
- Other client service activities as needed

Project Management

- Own the full implementation process of client events
- Create workflow for new clients based on a template
- Follow up with client to update tasks and keep accountability
- Request basic information from clients
- Schedule internal and external meetings

Qualifications

- Bachelor's degree – Required
- Strong project management and problem-solving skills
- Strong time management skills
- Ability to work independently as well as in collaboration in a team environment
- Thorough understanding of the technology used by the firm and how it applies to clients
- Minimum 3-5 years of professional services experience