

## **PUNCH & ASSOCIATES INVESTMENT MANAGEMENT INC.**

### **EXECUTIVE ADMINISTRATIVE ASSISTANT**

#### **SUMMARY**

Provides full time comprehensive administrative support to designated managing partners to assist in management of client relationships and the delivery of advisory services.

#### **DUTIES AND RESPONSIBILITIES**

##### **1. Oversees all aspects of managing partners' schedules**

- a. Keeps track of and issues reminders for upcoming projects, meetings, and due dates
- b. Gathers, coordinates, and prepares necessary materials for upcoming meetings in connection with the wealth strategy team members
- c. Schedules travel arrangements (and provides support before, during, and after) for offsite meetings and events
- d. Schedules internal conference room or any off-site meeting room needed with appropriate setup and equipment (including food/beverage needs as well as technology requirements)
- e. Coordinates agenda/itinerary preparation for meetings, if appropriate
- f. Coordinates with managing partners' personal calendars in certain circumstances

##### **2. Assists in marketing and client retention efforts**

- a. Maintains client information on internal software, including proactively adding new people as names are seen on calendars and correspondence
- b. Tracks and schedules regular meetings with priority contacts
- c. Manages and plans client meeting schedules
- d. Assists with corporate event planning
- e. Anticipates client and referral source needs
- f. Tracks special occasions for priority contacts (e.g. birthdates); coordinate cards and gifts

##### **3. Manages communication and office tasks**

- a. Answers, directs, and places calls; records messages
- b. Reads, sorts, and dates incoming mail, e-mail, voice messages, and faxes, responds directly when appropriate
- c. Ensures out of office messages for phone and email are on and accurate when needed
- d. Anticipates the next logical step
- e. Anticipates obstacles, repercussions, and stumbling blocks
- f. Helps to create "form" or "master" documents as needed
- g. Transcribes meeting notes
- h. Proofreads for spelling, punctuation, grammar, consistency, and accuracy; makes suggestions/corrections as necessary
- i. Other matters may include: photocopying; scanning; e-filing; preparing and editing PowerPoint presentations; arranging for messengers; processing expense reports; registering for classes / conferences; maintaining record of continuing education courses for reporting purposes

## **KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED:**

1. Completion of business school or related professional secretarial degree program; 10+ years of related work experience
2. Enthusiastic about firm values:
  - a. Aim past the target
  - b. Diligence and persistence
  - c. Humility
  - d. Build the firm for permanence
  - e. Fun place to work
3. Outstanding interpersonal and client service skills
4. Excellent written and verbal communication skills
5. Superior organizational skills and strong attention to detail
6. Ability to proofread written material for grammatical, typographical, and spelling errors
7. Expert knowledge of Microsoft Programs Word and Outlook, working with .pdf files (Adobe), and databases; intermediate knowledge of Excel and PowerPoint; ability to quickly learn new software applications
8. Must be a team player and work effectively and efficiently in often time-sensitive situations
9. Innate sense of responsibility and integrity
10. Willing to continue professional development as needed and requested by management