

Executive Assistant / Office Manager (onsite)

Location: Walnut Creek, CA

We are looking for a full-time Executive Assistant/Office Manager to support our growing firm. The EA/OM is responsible for providing day-to-day operations and administrative support to all team members. The ideal candidate will be a well-rounded, detail-oriented individual with strong interpersonal skills. We seek an individual who brings a positive attitude and ability to work independently and collaboratively. The ideal candidate will be both proactive and resourceful. They must be confident in project management and interacting with executives. This role will also assist with certain larger projects as needed, such as our annual investor meeting. This position will report to the Operations Manager.

Responsibilities

Office Management & Executive Assistant duties will include but are not limited to:

- Identify and manage the day-to-day needs of the office including office suppliers.
- Plan office events and offsite meetings.
- Schedule and coordinate conference calls and meetings, travel, and office calendar
- Assist with marketing activities and materials such as website, brochure, social media presence and firm announcements.
- CRM data management and entry.
- Support recruiting efforts and onboard new employees.
- Other administrative duties and ad hoc projects

Vendor Management and Finance

- Assist with planning of Annual Investor Conference.
- Work with IT vendor to provide technical support for office equipment and systems.
- Work with CFO on compliance and cybersecurity.
- Work with the Operations Manager to plan, manage, and execute various projects related to marketing, IT, events, relocation, and new hires.
- Support Controller on accounting projects including organizing credit card statements, maintaining investor library and other finance ad hoc projects as needed.

Qualifications

- Bachelor's degree preferred, but not required.
- Prior work experience in a professional office environment.
- Excellent written and verbal communication skills.
- Strong Microsoft Excel, Word, and PowerPoint skills.
- Strong attention to detail and the ability to take initiative.
- Exceptional organizational, problem solving, and time management skills.
- Highly professional with demonstrated ability to prioritize, multi-task and work independently.

\$70-90k depending on experience, plus benefits