Trinity Family Wealth Advisors

# JOB DESCRIPTION

## EXECUTIVE ASSISTANT
## TRINITY FAMILY WEALTH ADVISORS

NELSON/KRAFT AND ASSOCIATES

# EXECUTIVE ASSISTANT

*This executive search is conducted by Nelson/Kraft & Associates on behalf of Trinity Family Wealth Advisors*

## ABOUT US

Trinity Family Wealth Advisors is a multi-disciplined team that serves high net worth families holistically in the areas of Financial & Estate Planning, Family Business Succession, Investment Management, Philanthropic & Legacy Planning, and Wisdom for Life. The firm provides counsel based on biblical principles helping clients gain clarity, contentment, and freedom in their wealth and stewardship.

Role Type: Full Time, Permanent

Role Location: Hybrid, Peterborough, Ontario (3 days in office)

## SUMMARY OF DUTIES & RESPONSIBILITIES

- Act as the first point of contact for clients and external professionals.
- Partner with firm Principal to manage their daily and weekly schedule; ensure proper prioritization and time management to complete targets and deliverables.
- Email and communications management on behalf of the Principal: email/message organizing, prioritizing, and responding when appropriate, both internally and externally.
- Oversee staff schedules to coordinate team touch bases and external meetings for all departments, including invitations, confirmations, boardroom bookings and beverage/food items, video conference preparation, and post meeting recording management.
- Ensure the Principal and participating stakeholders have all required documents prior to meetings they attend, electronic and/or printed.
- Review debriefs from various meetings, filing relevant aspects, scheduling/tracking next steps, and notifying team member(s) if responsible for actionable items.
- Plan travel arrangements for Principal and team members as needed.
- Manage network/prospect pipeline with Principal to advance business development and ensure regular contact is maintained.
- Work with Principal on monthly updates to the firm’s success metrics and sales pipeline.

- Manage license and membership renewals for the firm and staff: continuing education credits, insurance licenses, error and omissions coverage, and professional memberships.
- Turn draft material into client-ready final deliverables by editing and following branding guidelines.
- Responsible for firms' technology: renewing software licensing, coordinating hardware upgrades, and liaising with technical support firm on behalf of team as necessary.
- Work with Marketing team member as necessary to prepare, finalize, and post blogs to website, LinkedIn profile management, and email informational/sales content to our various networks.
- Track marketing data from website, LinkedIn, and email campaigns to identify effectiveness of marketing efforts.
- Responsible for website; interact with web developer and/or update website as necessary.
- Create, email, and track invoices to clients according to contracts.
- Arrange the onboarding of new staff, including systems setup, required hardware and supplies, payroll, etc. Work with new staff supervisor on an onboarding schedule.
- Varying administrative tasks including, but not limited to: research and fact checking, maintaining firm handbooks, tracking sick and vacation days, ordering gifts/flowers, post office and Staples trips, submitting personal and staff expenses, managing office supplies and swag.
- Attend professional conferences and professional development opportunities as requested.

***Please Note:*** *This is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible responsibilities, tasks, and duties.*

## SKILLS, ABILITIES & EXPERIENCE

1. Friendly and client-centric, and loves to go the extra mile in providing exceptional client care/service.
2. Strong organizational and administrative skills.
3. Time management: able to establish daily/weekly priorities for high work volumes, manage competing demands, and adjust priorities to accommodate changes and achieve deadlines.

4. Able to learn quickly.
5. Exceptional attention to detail.
6. Excellent communication skills (in person, phone, writing, and video conference).
7. Able to learn to anticipate the needs of the Principal (and team) to eliminate friction whenever possible.
8. Able to work effectively with limited supervision; does not mind working alone.
9. Self-starter: able to initiate tasks and projects without needing an external push.
10. Thrives in a fast-paced environment.
11. Able to handle sensitive information with discretion.

## COMPETENCIES

1. **Missional Focus** – recognizes Trinity as a business and a ministry and aligns personal behaviour with the vision, mission, and values of the firm.
2. **Ownership Focus** – takes responsibility for the role and deliverables they provide; accountable for achieving the results they have committed to.
3. **Problem Solving** – able to understand situations, organize the information, identify key factors, and develop solutions.
4. **Servant-Hearted** – energized by serving and supporting others.
5. **Pursues Excellence** – loves to exceed expectations, and desires to continually improve their skills, abilities, and deliverables.
6. **Flexibility** – willing to adapt to and work effectively within a variety of diverse and changing situations.
7. **Productivity** – able to complete tasks and deliver according to expectations in a demanding role.
8. **Fun** – enjoys humor and having fun while serving in a professional environment.

## QUALIFICATIONS

- College diploma or university degree.
- Intermediate computer and office equipment skills (excel, word, outlook, zoom).
- 5+ years' experience as an office administrator or executive assistant, preferably in financial services and/or customer service.

## SEARCH TEAM

**LEADING YOUR SEARCH | MATT ROBBERSTAD**

Ottawa, ON matt@nelsonandkraft.com

Matt is an accomplished Talent Acquisition Manager with a strong background in the non-profit sector. With over a decade of leadership experience in recruitment and retention, he has a proven record of success. Matt has effectively managed end-to-end recruitment processes for a wide range of positions at Christian Horizons, a major faith-based developmental service organization in Canada. His extensive expertise in recruitment and selection enables him to identify the ideal candidates for various organizational roles. Additionally, Matt is well-versed in employee relations, engagement, and human resources, making him a valuable consultant. Through a ministry-minded focus, and commitment to responsiveness, he aims to serve his stakeholders with excellence as an Associate.

**SUPPORTING YOUR SEARCH | ALEXA KROEKER**

Abbotsford, BC alexa@nelsonandkraft.com

With extensive experience in executive and board assistance, Alexa combines her recruitment expertise with a keen understanding of organizational needs to build high-performing teams. She's adept at crafting compelling job descriptions and leveraging targeted advertising strategies to attract the best candidates for your organization. From the initial kickoff meeting, Alexa listens attentively to understand the nuances of your ideal candidate, ensuring a tailored and effective recruitment approach. Committed to excellence, Alexa is your go-to partner for successful talent acquisition, driving your organization towards greater success.

## HOW TO APPLY

Application Deadline: August 23, 2024

Apply online at nelsonandkraft.com/jobs/ with your cover letter and resume, or email Matt Robberstad (matt@nelsonandkraft.com) or Alexa Kroeker (alexa@nelsonandkraft.com) to inquire about or discuss the opportunity. You must be eligible to work in Canada.

Nelson/Kraft & Associates Inc. is an executive consulting firm that specializes in working with not-for-profits and for-profit businesses across Canada, assisting them in the placement of senior executives and directors.

*Nelson/Kraft & Associates Inc. welcomes and encourages all interested applicants to apply for this position. Nelson/Kraft & Associates Inc. is committed to the principles of diversity and inclusion in its hiring practices, and will only make distinctions among interested applicants in accordance with the applicable Human Rights legislation.*

*Nelson/Kraft & Associates Inc. also welcomes and encourages applications from candidates with disabilities. Accommodations are available on request for candidates taking part in the selection process. If you require disability-related accommodation during the recruitment process, please contact us.*