

Executive Administrative Assistant

Title: Executive Administrative Assistant
Reports To: Managing Director

SUMMARY: Primary support for Managing Director and Case Design Director in a PartnersFinancial Executive Benefits and Estate Planning member firm.

POSITION AVAILABLE: 1st Quarter 2018

RESPONSIBILITIES:

- Assist in the preparation of client presentations and spreadsheets
- Client service issues
- Client database (CRM) management
- Transcription of voice files
- Oversee maintenance and service providers for office equipment and systems

KNOWLEDGE, SKILLS and ABILITY:

- Strong organizational skills and attention to detail
- Able to handle multiple tasks
- Excellent verbal and written communication skills
- High proficiency with Microsoft Office Suite, in particular Word and Excel
- Life insurance and/or investment background an advantage
- Strong team player

EDUCATION / EXPERIENCE:

- High School diploma - minimum
- 10 or more years office experience

LOCATION: Arboretum Office Park at Powhite and Midlothian Turnpike in Richmond, VA

WEBSITE: www.daviswalker.com

RESPOND WITH RESUME TO: John Gargula j.gargula@daviswalker.com or to DavisWalker Ltd., 9100 Arboretum Parkway, Suite 260, North Chesterfield, VA 23236

Note: The information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

DavisWalker, Ltd. is an equal opportunity employer.