

**The Family Wealth Alliance**  
www.fwalliance.com

**Administrative Assistant**

***Position Specification***

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***The Client***

This is a position that supports a leading consulting organization based in Wheaton, IL.

***The Opportunity***

This is an excellent opportunity for an experienced individual to provide executive, administrative, and project support as needed on a full-time basis.

***The Position***

- Location: The firm's executive offices are located in downtown Wheaton, Illinois.  
Supports: The firm's entire senior management team in its activities and projects.

***Responsibilities***

Assisting, organizing, prioritizing and helping to execute the firm's day-to-day business operations. Responsibilities will include but not be limited to the following:

- ☒ Answer phone calls, take messages as well as arrange and schedule all meetings and travel for the CEO;
- ☒ Greet the firm's members, clients;
- ☒ Coordinate meetings;
- ☒ Provide clerical and document generation support for meetings;
- ☒ Perform clerical duties, including the preparation of letters, various reports, electronic communication, memoranda or other correspondence as required;
- ☒ Provide clerical and project assistance to the CEO as well as the firm's consultants when necessary;
- ☒ Act as a communicator with other team members - and in some cases be the project coordinator - for specific projects, helping to ensure that each progresses through its various phases to successful completion;
- ☒ Coordinate with our Meeting Manager and the CEO on all events, including events that are hosted by our firm and events that our firm is engaged to speak at;
- ☒ Maintain daily communication with each project and team member as well as keep track of progress, reminding team members of deadlines, and answering clients' questions about certain projects or engagements;
- ☒ Provide basic information in support of day-to-day activities, including retrieving information from our database and conducting internet searches and research;
- ☒ Organize and streamline the workflow of the CEO and the firm's consultants (in town and out of town) and the business;
- ☒ Order supplies for the executive office as necessary, as well as retrieve and distribute mail.

## ***The Ideal Candidate***

The ideal candidate will possess the following qualifications and personal attributes:

- ⌘ **MUST** be highly proficient in Microsoft Office applications (Word, Excel, PowerPoint), Internet usage and knowledge of at least one database platform, and typing speed of at least 55 words per minute;
- ⌘ Excellent organizational skills and ability to juggle and prioritize several projects;
- ⌘ Trustworthy, discreet, and ethical and respectful of the confidential aspects of the firm's business and clients;
- ⌘ Drive, initiative and a take-charge style; someone who is able to work independently;
- ⌘ Willing to learn new things, flexibility to adapt to changes in the company's business model;
- ⌘ Excellent written and verbal communication skills, with attention to accuracy and detail;
- ⌘ Professional poise which communicates well over the phone;
- ⌘ Ability to interact effectively with people at all levels – including very senior executives;
- ⌘ Creative and a self-starter, with the ability to cope in a highly entrepreneurial setting;
- ⌘ Team player with a great attitude

## ***Education***

Undergraduate degree is preferred, but practical experience, previous on-the-job training will also be key determinants.

## ***Compensation***

A starting salary will be offered with an initial probation period of 90 days. Because of our firm's core values, family does take precedent, which makes this an excellent setting in which to work. It is hoped that this person will grow in this position both in skills and responsibility.

## ***Contact***

Kathy Harbke at 630-684-2210