Administrative Assistant/Office Manager

THE POSITION

A newly established family investment office and charitable foundation are currently seeking an Administrative Assistant and Office Manager. The investment office is a Chicago-based investment firm affiliated with a single-family. The team selects and oversees publicly traded securities, equity interests in private companies, and investments with outside managers. The charitable foundation is focused on education equity. It stands for a world where every person of every race, belief system, and socioeconomic status has the opportunity to reach their full potential; where every individual is inspired to learn, grow, and contribute to society; and where specialized services and programs intentionally address systemic inequities.

As the Administrative Assistant, this individual will perform a wide range of administrative support activities and assist the firm’s Chief Investment Officer (CIO) and foundation’s Executive Director (ED). The Office Manager responsibilities include organizing and coordinating office operations, procedures, and resources to facilitate effectiveness and efficiency for the entire organization. Regular involvement in high-level client contact and exposure to sensitive information requires considerable tact, diplomacy, and judgment. Advanced administrative and analytical skills are essential.

POSITION RESPONSIBILITIES & DUTIES

Administrative Assistant

- Manage and maintain the CIO and ED’s calendars, including making appointments, scheduling internal/external meetings and conference calls, sending reminders, and drafting follow-up emails. Proactively raise issues and reschedule meetings when needed.
- Draft and edit correspondence, communications, presentations, and other documents.
- Coordinate travel itineraries, flights, hotel accommodations, rental cars, and other travel needs.
- Complete monthly expense reconciliation for corporate credit card and out-of-pocket expenses.
- Prepare agendas, briefing materials, and presentations for meetings.
- Support other senior staff on ad-hoc projects as needed and perform other duties and responsibilities as requested.

Office Manager

- Oversee all daily office functions ensuring operations run smoothly and staff has a productive work environment.
- Serve as the first point of contact to answer, screen and transfer incoming calls, greet visitors, and prepare space for meetings.
- Manage centralized office email, including organizing and prioritizing communications, forwarding correspondence to colleagues as needed, filing all investment reports and documents on the network, and responding to inquiries appropriately and professionally.
- Be responsible for all vendor management, including ordering equipment and supplies, managing and monitoring service levels, invoice reconciliation, and addressing unsatisfactory vendor services.
- Manage the IT environment and serve as a liaison with the IT consultant.
- Maintain office files, records, and the central database of Outlook contacts.
- Provide event-planning assistance as needed for events.
- Coordinate all staff activities such as team luncheons, volunteer activities, social engagements, and holiday celebrations.
• Provide other basic administrative and general office management tasks, including filing and information management, maintenance of office supplies and refreshments, building management coordination, and family data maintenance.

ESSENTIAL SKILLS AND BACKGROUND

• Bachelor’s degree required.
• Five years of administrative experience supporting executives required.
• Computer literacy and proficiency in Microsoft Office, advanced skills in Outlook.
• Attention to detail is a must, as well as strong organizational skills.
• Experience with making travel arrangements.
• High level of professionalism and a strong ability to relate to people of all business levels.
• Strong problem-solving skills with an ability to anticipate needs.
• Passionate, enthusiastic, team player with good judgment and an ability to work in a fast-paced environment and adapt quickly to changing needs and priorities; proven ability to prioritize and manage multiple tasks simultaneously with little direction.
• Unquestionable integrity; comfortable with a high level of confidentiality; honest, discrete, and loyal.
• Innately curious, skeptical, and willing to think outside of the box as he or she analyzes a problem or set of data.
• Willingness and initiative to expand into additional roles and undertake other responsibilities depending on office workflow.

WORK ENVIRONMENT

• We provide equal employment opportunities to all applicants and employees in a harassment-free environment without regard to race, religion, color, national origin, gender, age, disability, sexual orientation, alienage, veteran status, or any other protected characteristic.
• This position will be in Chicago and may require travel to the north suburban office several times per month.
• Any employee starting in this position must be fully vaccinated against COVID-19, including any relevant boosters. This position will require the successful candidate to provide proof that they are fully vaccinated by their start date. We are an equal opportunity employer and will provide reasonable accommodations to those individuals who cannot be vaccinated for COVID-19 consistent with federal, state, and local law.

COMPENSATION

• A competitive salary commensurate with experience and an annual merit-based bonus.
• Comprehensive benefits including Health Insurance (Medical, Dental, and Vision), Basic Term Life/AD&D Insurance, Short- and Long-Term Disability Insurance, Parental Leave, 401k, and Flexible Paid Time Off.

NEXT STEPS

Please send a resume and cover letter to Mary Nelson at mnelson@councilringcap.com by May 23, 2022. Subject line should read: Your Name (Last, First): Administrative Assistant/Office Manager.