

Executive Assistant

Summary

The Executive Assistant plays a dual role by providing advanced-level business analysis and administrative support to both the Executive Vice President of Accounting and Finance and the Chief Operating Officer. In addition to administrative tasks, this individual helps manage the worktime of the two executives by proactively fielding inquiries and initiating responses as much as possible. Trust and communication are integral to this position and must be maintained at all times. A highly professional tone, appearance, and manner is both expected and required, including appropriate communication in person, on the phone, and in correspondence. Duties vary in scope, requiring significant judgment and experience to successfully accomplish tasks with limited direct supervision.

Job Responsibilities (responsibilities may include but are not limited to the following)

- Manage a checklist of open tasks and document weekly priorities
- Provide daily updates of upcoming events and deadlines
- Schedule meetings and make travel arrangements
- Prepare and coordinate materials for meetings, presentations, and conferences
- Take notes at meetings, as needed, and provide reminders of follow-up action items
- Oversee the investor management system, including onboarding new investors, updating project information, and serving as the point person for investor matters
- Perform administrative functions, such as answering phones, responding to email, drafting documents, and maintaining electronic file storage
- Track deliverables and set calendar alerts
- Ensure that financial statements submitted for review are timely, complete, and meet established requirements
- Provide quality assurance for review of assigned documents, including complex spreadsheets (focusing on data integrity and not computation)
- Function as a personal assistant, as needed, such as ordering lunch or running business-related errands
- Compose correspondence and memos
- Compile data and prepare reports using Excel and word processing software
- Help coordinate event planning for critical operations meetings, including quarterly business reviews and monthly team meetings
- Track and maintain budgets for assigned accounts
- Reconcile expenses and corporate credit card statements
- Maintain general organization of each executive's workspace
- Work on special projects and perform other duties as assigned

Performance Objectives (objectives include but are not limited to the following)

- The 7 Core Values established by Crawford Hoying to maintain its desired culture
- Communication response time and professionalism
- Willingness to take on projects and learn a variety of concepts, practices, and procedures

Preferred Knowledge, Skills, Education, and Experience

- 3-5 years of executive-level administrative support or equivalent experience
- Excellent written and verbal communication skills
- Ability to meet deadlines in a fast-paced, quickly changing, and at times stressful environment
- Confidentiality and professionalism when working with sensitive information
- Exceptional customer service skills and an ability to develop a rapport with people

CRAWFORD HOYING IS A PROUD EQUAL OPPORTUNITY EMPLOYER

6640 Riverside Drive, Suite 500 | Dublin, OH 43017 | tel 614.335.2020

www.crawfordhoying.com

- Project management skills, including planning and coordinating tasks
- Strong analytical, organizational, problem-solving, and multitasking skills
- Ability to work in a team environment and interact with all professional levels
- Demonstrated proficiency with Microsoft Office products, especially Excel
- Knowledge of business operations and policies
- Associate's or bachelor's degree
- Valid driver's license

Bonus Skills

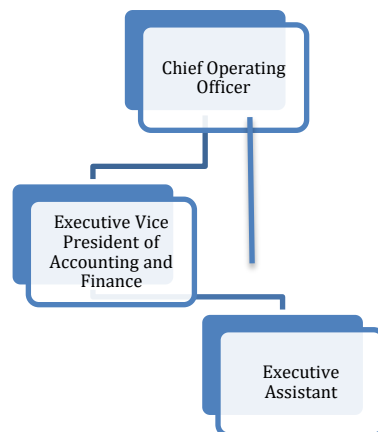
- QuickBooks, accounting, general ledger, and bookkeeping skills
- Experience with customer relationship management (CRM) systems and investor management software
- Technology expertise, such as social media platforms, Gmail, and Google
- Accounts payable/receivable experience; billing experience

Work Environment

The Executive Assistant works at the corporate office and interfaces with investors and external and internal customers throughout the day. The hours for this position are typically 7:30 am to 4:30 pm, Monday through Friday. This individual must be available to work extra hours when important projects present themselves.

Reporting Structure

The Executive Assistant reports to the Executive Vice President of Accounting and Finance and the Chief Operating Officer.



Physical Requirements

The Executive Assistant's physical condition must be sufficient for the consistent and successful completion of the responsibilities defined for this position. This position frequently requires standing, walking, sitting, reaching with hands and arms, and lifting up to twenty-five pounds. The Executive Assistant must be able to drive occasionally during the course of work.

If you are interested in applying for this position, please email your resume to hr@crawfordhoying.com

CRAWFORD HOYING IS A PROUD EQUAL OPPORTUNITY EMPLOYER

6640 Riverside Drive, Suite 500 | Dublin, OH 43017 | tel 614.335.2020

www.crawfordhoying.com