**Job Description**



**Position Title:** Executive Assistant

**Classification:** Exempt

**Reports To:** Chief Operating Officer and Chief Legal Officer

**Supervisory Responsibility:** None

**Date Created:** November 2019

**Summary/Objective:**

Financial Planning Standards Board Ltd. (FPSB) is a nonprofit association that manages, develops, licenses and operates certification, education and related programs for financial planning professionals to benefit and protect global consumers by establishing, upholding and promoting worldwide professional standards in personal financial planning. FPSB’s commitment to excellence is represented by the [marks of professional distinction](http://www.fpsb.org/CMS/index.php?option=com_content&task=view&id=90&Itemid=117) – CFP, CERTIFIED FINANCIAL PLANNER and CFP (with flame logo).

FPSB is seeking an energetic individual to support the smooth staff/office functioning of a dynamic global credentialing program.

**Essential Functions:**

* General clerical duties including photocopying, scanning, faxing, mailing and filing.
* Maintain electronic filing system.
* Coordinate and maintain records for staff office space, phones, parking, company credit cards and office keys.
* Draft routine communications.
* Set up and coordinate FPSB conference calls and meetings across multiple international time zones.
* Coordinate staff, travel and meeting schedules/logistics.
* Proofread and finalize meeting materials, correspondence, presentations and other business communications (MS Office, Suite of Applications).
* Maintain office environment; liaise with key vendors to support smooth functioning of FPSB’s office (e.g. facilities maintenance, phone, copier, office supplies).
* Coordinate hosting arrangements and accommodations for company visitors.
* Support staff projects, as assigned.

**Skills and Competencies:**

* Advanced Proficiency with of MS Word, MS PowerPoint, and MS Outlook; proficiency with MS Excel preferred.
* Ability to exercise independent judgement, critical thinking and follow-through to execute projects, from initial stage through completion, collaboratively across the organization.
* Ability to represent FPSB to international stakeholders with professional poise and cultural savvy.
* Ability to handle multiple tasks simultaneously and work within tight deadlines with a positive attitude, even when under pressure.
* Ability to communicate effectively, both verbally and in writing, with working knowledge of English grammar and ability to proofread and correct written work.
* Desire to be part of a small team making a positive impact in the global financial community.
* Ability to support three highly productive senior organization leaders.

**Education and Experience:**

* Associate’s or bachelor’s degree preferred
* Five to eight years’ experience in an administrative / executive assistant role, or similar, with a record of achievement.

**Work Environment:**

* Sitting for long periods, standing and walking intermittently
* Indoor office environment, temperature controlled
* Occasionally lift or move up to 20 pounds
* Open-space floor plan

**Expected Hours of Work:**

This role is considered full-time working approximately 40 hours per week and is exempt from overtime. Schedule flexibility may be permitted but must be available during the "core" work hours of 8:30 a.m. to 4:00 p.m. Occasional evening and weekend work may be required.