

# Executive Assistant to Phil – Job Description

Job Title: Executive Assistant to the President  
Department: None  
Reports To: President and Director of Operations

## **POSITION SUMMARY:**

Provide direct administrative support to President of firm both professionally and personally handling all aspects of President's office as requested.

## **RESPONSIBILITIES:**

- Direct administrative support (both personal & professional) to President of firm to include, but not limited to; direct coordination of daily calendar to include scheduling of all staff and client appointments, scheduling project days and assist in keeping President on schedule at all times; answer/screen/initiate phone calls for President; respond to all client requests on behalf of President to include any needs, solutions to any problems, changes to clients documents and organize/summarize all items communicated to President; timely preparation and submission of all assigned projects to include, but not limited to; transcription of audio tapes, proposals, agreements, flyers, direct mail letters, marketing materials type/compose correspondence as needed/requested; internet research as requested; review/distribute mail for President's review and respond to inquiries as appropriate; separation of all articles/ads received and provide to President all new articles on Estate Planning/Probate/Wills, along with any new competitor ads; organization/tracking of President's airline/hotel statements for points earned; all travel arrangements as requested, provide daily lunches; routine filing.
- Maintain confidentiality and work independently;
- Maintain files, provide reports for State Bar, Certified Specialist, CFP and all continuing education classes to include on-going tracking of continuing education credits;
- Travel coordinator for applicable staff;
- All other projects as assigned

## **REQUIRED SKILLS:**

Telephone/Meeting Etiquette, Oral Communication Skills, Written Communication Skills, Interpersonal Skills, Professionalism, Organization, Planning, Proofreading and Grammatical Skills, Time Management, Computer Literacy, Type 60 WPM

## **EDUCATION/TRAINING:**

AA or Bachelor's Degree and/or at least five (5) years related work experience in a business setting required.