

# **VIGILANT Capital Management, LLC**

## **JOB DESCRIPTION**

**JOB TITLE:** Office Administrator

**LOCATION:** Primarily based in Portsmouth, NH office with travel to Portland, ME office as needed

**EMPLOYMENT CLASSIFICATION:** Full-time, non-exempt salaried employee

### **ESSENTIAL JOB FUNCTIONS:**

- General office support:
  - Greet visitors, provide necessary accommodations, prepare and keep conference rooms organized and stocked appropriately for ongoing meetings
  - Collect incoming mail and packages, determine level of priority, process and/or distribute accordingly
  - Prepare letters and outgoing mail/packages, create mail merges as needed, prepare gift mailings, bring outgoing items to local collection box(es)
  - Schedule and organize various activities and meetings, circulate holidays and other reminders, coordinate travel
  - Master/conference room calendar management, monitoring for proper booking and overbooking
  - Prepare expense reports, review credit card transactions against receipts, track expenses as needed
  - Monitor fax inbox and periodic voicemails from main line and distribute accordingly, send outgoing faxes
  - Punch and bind miscellaneous reports and presentations
  - Add contact information and making updates to CRM
  - Electronic filing of documents on the network, tracking receipt of documents
  - Serve as the primary point of contact for certain vendor relationships, submit tickets to technology vendor, call in service repairs, etc.
- Maintain copy/filing room responsibilities including:
  - Taking inventory of all office supplies, ordering and stocking back-ups
  - Ensuring all equipment is running properly, regularly stocking paper trays, refilling postage machine, etc.
  - Maintain overall cleanliness and organization of the space
- Maintain kitchen responsibilities including:
  - Taking inventory of food and beverage, ordering and stocking back-up supplies, light weekly shopping
  - Maintain overall cleanliness and organization of the space, regularly run/empty dishwasher
  - Ensure office trash and recyclables are brought out to curb for pick-up each week
  - Budget/expense monitoring, implement cost saving solutions
- Provide miscellaneous support to the CCO, Business Operations, Investment Operations, and Marketing Manager, as needed

- Possible back-up support to Client Relationship Associates and other colleagues, during absences and on an as-needed basis
- Play an active role in various firm committees – prepare and contribute thoughts for agendas, raise concerns, suggest solutions, look for and implement efficiency and process improvement
- Other miscellaneous tasks and responsibilities, where the above list is not intended to be all-inclusive

#### **KNOWLEDGE, SKILLS AND ABILITIES:**

- Proficient in Microsoft Office suite, including word processing, spreadsheets, and presentations
- Knowledge of or an aptitude for learning the Tamarac Suite (CRM and portfolio accounting software), and Schwab Institutional's website
- Excellent interpersonal skills and professionalism
- Strong oral and written skills
- Well-developed presentation skills
- Meticulous attention to detail, particularly as it relates to composing, typing and proofing materials
- Ability to effectively manage time, establish priorities, meet deadlines and multi-task in a fast-paced environment
- Resourceful, analyzing and solving problems in a self-reliant, proactive manner
- Ability to work both in a team-oriented environment and independently
- Exercise discretion with regard to confidential information
- Ability to work beyond standard office hours and attend offsite events, as necessary, while properly managing and accounting for work time
- Ability to travel between offices, typically in Maine and New Hampshire
- Ability to lift ≤25 lbs.

#### **EDUCATION AND EXPERIENCE:**

- College Degree or equivalent is a plus
- 1-3 years administrative experience or in a support role
- Experience in financial services preferred but not required
- Experience with CRM related software is a plus
- Experience with finance and schwabinstitutional.com helpful