

ADMINISTRATIVE ASSISTANT WITH STRONG EXCEL AND POWERPOINT – (5754)

The Administrative Assistant supports a team of Investment Analysts, Portfolio and Client Service Managers.

DUTIES:

- Assist in the production of a high volume of presentation materials for client meetings, industry conferences or management visits by utilizing various software packages
- Utilize PowerPoint and Excel to edit and update presentation materials
- Prepare monthly and quarterly client reports as well as internal reporting
- Prepare materials for client visits and research trips
- Perform general office duties, including updating client contact information, photocopying, distributing reports and filing
- Back-up and assist other Administrative Assistants to coordinate travel arrangements and calendars, submit expense reports, and request catering for internal meetings

QUALIFICATIONS:

- Four year college degree preferred
- Minimum three years of experience in a related position in the financial industry; fixed income experience a plus
- Excellent written, verbal, and interpersonal communication skills, including the ability to interact effectively with Portfolio Managers, Client Service Associates/Assistants and clients
- High level of proficiency in Microsoft Office applications, especially PowerPoint, Excel, and Word, as well as competency with the SharePoint collaboration platform
- Service-oriented individual who is organized, detail-oriented, flexible, reliable, proactive, and team-oriented
- Demonstrated ability to manage multiple priorities under pressure and to take independent initiative for action within areas of responsibility
- Quick learner with a flexible attitude and a willingness to take on new project

SEND RESUME AS AN MS WORD ATTACHMENT TO diane@dmstone.com

