



GV Financial

A D V I S O R S

Junior Administrative Assistant

Supporting Executive Assistant to Chief Operating Officer & VP of Sales

Company Information

GV Financial Advisors is an Atlanta-based, privately-owned company that offers Guided Wealth Transformation™ (GWT™) to successful families. This process is designed to help successful families use their wealth to create the life they desire, enhance the lives of the people they care about, and establish a living legacy that represents their passions and values. Bringing clarity to what our clients really desire, we are able to join together all of the different elements of financial planning into a comprehensive game plan devoted to achieving those ambitions.

There are four core values that serve as the guiding principles for everything that we say and do, both with our clients and our team members:

- ***We do what is right.*** We are guided at all times by the principles of ethics and integrity. We are honest not simply because it is good for business, but because it is the right thing to do.
- ***We are advocates for our clients and the people and causes they care about.*** No one outside of family members will care more about our clients' financial futures than GV Financial Advisors.
- ***We strive to be more than fair.*** We set and maintain the highest standards in our relationships with our clients, other professionals, and our employees.
- ***We take responsibility for all we say and do.*** Our clients place enormous trust in us and in our recommendations. We take that responsibility to heart and accept full responsibility for our actions and recommendations. Our job is to deliver the advice and services our clients expect and deserve. We know we only win when our clients win.

Position Information

This position will support the Executive Assistant to the Chief Operating Office and the VP of Operations. The position will report to the Administrative Services Manager, and much of the work for this position will be directed by the Executive Assistant to the COO & VP of Operations. The responsibilities may include (but will not be limited to):

- Retrieve & document voice mails to present to COO and VP of Operations
- Check and print email for COO
- Create & modify documents using Microsoft Office
- Perform general clerical duties to include but not limited to: photocopying, faxing, scanning, mailing & filing
- Maintain hard copy and electronic filing systems
- Perform research (including internet-based research) for various projects
- Coordinate & maintain records for company Amex cards and prepare reports for Accounting Department
- Schedule meetings (using Microsoft Outlook) with both internal and external attendees
- Set up, coordinate, & clean up after meetings & conferences
- Provide support in assigned project-based work
- Maintain & update various Microsoft Excel spreadsheets
- Perform other assignments & projects as directed by the Administrative Services Manager and/or the Executive Assistant to the COO & VP of Operations

Requirements:

- The ability to multi-task is very important for this fast-paced environment – Priorities can change from one minute to the next, so the successful candidate must be comfortable juggling different projects and be able to move quickly and easily from one project to another.
- Optimistic, positive “can do” attitude is required, and an active and creative sense of humor is preferred
- The ability to maintain good relationships with others in the company is necessary in order to accomplish the constant inter-departmental work that we perform.
- Problem-solving skills and the ability to look at a difficult situation through the lens of “how can I improve this?”
- Advanced Outlook/Calendar skills – Ability to follow guidelines when booking meetings & to make a decision with minimal help when necessary to move, cancel or reschedule meetings
- Advanced Word, Excel & PowerPoint skills required; prior experience using various formulas in Excel is preferred
- Internet research skills are required – must be able to gather and organize data in a manner necessary for decision making
- The ability to quickly pick up and learn new software programs
- Outstanding verbal & written communication skills and excellent telephone etiquette
- The ability to handle unexpected circumstances with poise & calm
- Must be deadline-oriented and able to cope with rapid changes

- Must exhibit a thoughtful, analytical approach to decision making & work tasks and be able to calculate risks before taking action
- The ability to track, organize & maintain data and assignments from various projects is required; prior experience in project management or college study in project management preferred