



Title: **Business Consulting Administrative Assistant**

Location: Des Moines, IA

### **JOB SUMMARY**

The Business Consulting **Administrative Assistant** is to take on projects and tasks from the Business Consulting team leadership so they can concentrate on supporting the strategy and growth of the team, and execution of client projects. This position is seen as a go-to support function for Business Consulting leadership and the team as a whole, and will accordingly, work on a variety of tasks. The Administrative Assistant will be a top contributor to the Business Consulting team by creating an environment where both hard work and fun are the norm; where both clients and team members are treated promptly and with respect; and where the Creative Planning Business Services brand and core values are lived every day.

### **JOB DUTIES**

- Conserves the leader's time by reading, researching, and routing correspondence; drafting letters and documents; collecting and analyzing information to disseminate appropriately; initiating communications on the leader's behalf
- Schedule meetings on leader's behalf with clients; with internal team members; and participate in meetings
- Outlook assistance and calendar coordination
- Provide a welcoming and helpful experience to all prospects, clients, and team members in person, by phone and by email
- Assist in new client intake and client file set up
- General project management
- Provide weekly production reports and updates for Leadership
- Assist with approving and submitting expense reports
- Assist scheduling and coordination of team and market events, conferences, and booking travel
- Maintain internal access to software realms
- All other duties as assigned

### **REQUIRED EXPERIENCE / QUALIFICATIONS**

- Ability to work in a fast-paced, team environment with the goal of meeting tight deadlines under pressure
- Ability to successfully manage multiple and competing priorities
- Ability to handle sensitive information AND ALWAYS maintain confidentiality
- Technical aptitude
- Strong written and verbal communication; excellent interpersonal skills
- Organized and detail oriented; able to maintain records and files
- Strong desire for continual learning and supporting process improvements
- Meticulous attention to detail, as well as reliability and ability to carry out daily functions in an efficient and timely manner
- 3+ years' experience in an Administrative Assistant role

### **TECHNICAL SKILLS**

- Proficient in Microsoft Office
- Strong analytical and problem-solving abilities
- Excellent written and verbal communication skills