



The Client Service Assistant is primarily responsible for providing administrative support to the investment staff, including word-processing, report production, and organizing and maintaining company files. The Client Service Assistant is also responsible for maintenance of contacts and calendars within the company's contact databases.

The Client Service Assistant reports directly to the Investment Operations Supervisor in San Diego.

**Required Skills:**

- Strong knowledge and facility with Microsoft Office software, especially Word
- Strong organizational skills
- Professional telephone manner
- Excellent attention to detail
- Strong interpersonal skills
- Ability to work accurately in a detailed and time-sensitive environment
- Ability to work well with employees from other company departments
- Willingness to learn and understand the different facets of our business
- Minimum of two years of administrative experience in a corporate setting

**Essential Responsibilities:**

- Prepare client-ready reports and correspondence, including editing, printing, binding, and distributing client quarterly reviews
- Provide administrative support to investment, operations, and systems staffs as needed
- Provide backup for the receptionist, including answering and screening in-coming calls, greeting visitors, mail and fax distribution, and the preparation of facilities for in-house meetings
- Maximize company productivity through proficient use of appropriate software applications
- Work with other members of the administrative staff to establish and communicate broadly uniform administrative procedures and practices
- Fulfill any and all other duties deemed necessary by management

**Measures of Success:**

- Accuracy and timeliness of client report production and correspondence
- Degree of professionalism in telephone communications with clients and others
- Responsiveness to requests for administrative support, including requests for word-processing and report production assistance
- Improvements in quality and efficiency of work product
- Levels of satisfaction of company employees, clients, and guests as end-users of the Client Service Assistant's Service