

The following are responsibilities for the Executive Assistant:

1. Organize filing system; utilize contact management software; create database for client information
2. Vendor contact; office machines and products, telephone system, Investment Platform and banking relationships.
3. Personnel including
  - a) Payroll
  - b) Employee Benefits
  - c) Track sick|vacation time
  - d) Reviews
  - e) Assist in hiring staff and interns
4. Coordinate staff
5. Create and update office calendars (travel/vacation schedules)
6. Implement office-meeting schedules? weekly? (To increase internal communication with research team, sales team, etc.)
7. Assist in annual client reviews.
8. Create reports to monitor client investments (how many assets in x fund, y stock and z bonds; cash available, etc.) Also create sales reports to monitor sales team efforts.
9. List whatever projects you have and prioritize!

*Investment Management Firm seeking Executive Assistant with 2+ years business experience. Must be flexible in a fast-paced environment. Experience with a Brokerage firm or bank a plus.? Background to include MS Word, Access, Excel, PowerPoint, Lotus, Internet Savvy (searching, LinkedIn, SlideShare and Facebook) database management & light accounting a plus. Will lead to office management Opportunity. Salary commensurate with experience.*

*Please send resume to,  
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