Corporate Solutions – Executive Assistant

VisionPoint Advisory Group is a leading independent financial consultancy firm with a headquarters in Dallas, Texas and branches in Iowa, Minnesota, South Dakota, Colorado & Arizona. Our firm is dedicated to helping our clients succeed through a collaborative approach, a team-oriented work environment, and non-commission-based compensation. This unique approach provides a heightened value proposition within the financial services industry, resulting in stronger overall enterprise value.

VisionPoint Advisory Group, we offer comprehensive financial advisory and consulting services to private clients and employer-sponsored retirement plans. Our team of specialists work collaboratively to help our clients define and achieve their vision of True Wealth. Our proprietary approach brings all the necessary advice and services together under one roof, eliminating the need for clients to manage multiple financial relationships or make complex decisions on their own. Our sole purpose is to make our clients' visions a reality.

Position Summary:
We are seeking a highly organized and detail-oriented executive assistant to support our Corporate Solutions Services division. The Executive Associate provides support to Corporate Solutions team members, VisionPoint Pooled Employed Plan (PEP) plan service providers and participants. The ideal candidate has a passion for supporting executives and a commitment to providing exceptional administrative support. This position requires excellent communication skills, the ability to multitask, and the ability to prioritize tasks in a fast-paced environment.

Primary Responsibilities:

- Manage and prioritize incoming calls and emails, responding to inquiries and directing them as appropriate
- Provide daily support to the Corporate Solutions Services team and the consultants
- Sets, confirms & reschedules consultants' appointments as needed
- Coordinate and schedule internal and external meetings and conference calls
- Coordinates with plan service providers to obtain necessary information
- Prepare meeting materials and client deliverables
- Prepare all plan provider/client periodic review presentations
- Maintain and update departmental files and databases
- Utilizes software for report creation
- Manage and update client databases and regulatory logs
- Assist in the preparation of presentations, reports, and other documents
- Organize and execute mailings to clients
- Coordinate participant transition to retirement coaches and private client groups as needed
- Ensure that all deadlines are met and that work is completed accurately and efficiently
- Handle confidential and sensitive information with discretion and tact
- Perform other administrative duties as assigned by the executive

Qualifications:

- Bachelor's degree preferred
- At least 2 years of experience as an executive assistant or administrative support role
- Prior experience supporting financial service, legal, or consulting teams.
- Strong organizational skills and attention to detail
- Excellent written and verbal communication skills
- Ability to prioritize and manage multiple tasks simultaneously

- Ability to apply problem-solving skills to complete tasks
- Ability to work under tight deadlines
- Proficiency in Microsoft Office (Word, Excel, PowerPoint, and Outlook)
- Ability to work independently and as part of a team
- Strong interpersonal skills and the ability to work with people at all levels of the organization
- Capacity to respond appropriately to clients and escalate issues to management if necessary
- Discretion and confidentiality

Working Location:

- **Location:** Minnesota, Texas, South Dakota, Iowa
- **Department:** Corporate Solutions Services
- **Reports to:** Jacinta Thompson