
JOB TITLE: Administrative Assistant
DEPARTMENT: Account Management
REPORTS TO: Institutional and Trust Administration Manager
CLASSIFICATION: Non-exempt
LOCATION: DALLAS, TEXAS

Position will provide administrative support to the Account Management team. Support may also be provided to other HighGround teams as needed.

WHO YOU ARE

As an Account Administrator, you are a part of the account management team and are passionate about working with and serving others. You enjoy preparing client presentation material and following up on client inquiries. Being well-rounded, you can prepare reports while having professional etiquette and demeanor when communicating with external clients and internal team members. You are a team player but can take an idea and run with it with little supervision.

You are someone who thrives on change and remains flexible as procedures develop. Instead of merely completing a task, you offer insight into ways to improve processes. It can get busy around here, but when the going gets tough, you prioritize, work with your team, and complete your tasks. Punctuality in both work and attendance is one of your top objectives.

Essential duties and responsibilities

YOU ARE EXCELLENT AT:

- Produce and distribute correspondence memos, letters, faxes and forms on behalf of the account administration department
- Reply to email, telephone or in-person inquiries and assist with monitoring the team email box used for client inquiries
- Assist with the preparation and mailing of tax documents
- Assist with the preparation of materials needed for internal and external audits and audit confirmations
- Process transactions as needed
- Prepare presentations and materials for clients, prospective clients and board meetings
- Answer and direct phone calls
- Assist in the preparation of regularly scheduled reports
- Serve as Secretary for the Trust Administrative Committee responsible for minutes and distributing materials for each meeting
- Assist with data entry and integrity for the customer relationship management system
- Scan documents into our client portal as well as assist with user set-up and maintenance
- Prepare and submit expense reports
- Assist with team projects as needed
- Serve as backup to the administrative assistant in the accounting department
- Cover the reception desk as required
- Develop and update administrative systems to make them more efficient
- Distribute the mail to the account management team
- Provide general support to visitors
- Maintain supply inventory and coordinate repairs to office equipment for the account management team
- Assume responsibility for related duties as required and assigned

Competencies and qualifications

YOU HAVE:

- Two-year college degree or vocational/technical school preferred
- Three+ years' experience as an administrative assistant is preferred
- Strong computer skills, specifically with Microsoft Office Excel, Word and Outlook
- Ability to learn and utilize internal systems and applications
- Excellent verbal, written, and interpersonal communication skills with the ability to interact with all levels of clients and internal personnel
- Must be a self-motivated team player with strong attention to detail, a high level of accountability, organizational skills and the ability to work independently
- Ability to always maintain a high degree of ethical standards and complete confidentiality
- Ability to multi-task, prioritize and problem solve
- Experience with Adobe Pro, InDesign and SalesForce is a plus
- Remain insightful, caring and flexible as it relates to the organization's mission, team members and clients

HighGround has a professional, open office environment

ADMINISTRATIVE ASSISTANT WORKING CONDITIONS:

- Routinely uses standard office equipment such as computers, phones, multi-functional copiers and filing cabinets
- Usually sits to complete job functions, but may walk or stand for brief periods of time (access to sit-to-stand desks for optimal flexibility is provided)
- Must be able to lift up to 25 pounds
- Is required to have close vision, distance vision and the ability to adjust focus
- Is required to have the ability to lift files, open cabinets and bend or stand on a stool
- Is required to work onsite as scheduled with the potential to qualify to work from home two days a week and has little to no expected travel

The above statements are intended to describe the general nature and level of work being performed by the person(s) assigned to this job. They are not intended to be an exhaustive list of all duties, responsibilities and skills required of personnel so classified. Employees holding this position will be required to perform any other duties as requested by management, from time to time in its sole discretion. This updated job description supersedes prior descriptions for the same position. Management reserves the right to add or change duties at any time.

WHO WE ARE

Our vision is to Protect, Strengthen and Grow our nonprofit clients. We believe there is no pursuit more important than this; because we believe the work we do now and, in the future, will not only shape our lives but will empower the many organizations that truly transform lives. This vision forms an authentic pathway to our mission—to be an innovative and vigilant caretaker of the funds and assets entrusted to us by the nonprofits and generous individuals we serve through effective asset management, gift planning strategies and account support services. It is the outcome we work towards—to have a greater impact on the world and individual lives. We hope you will decide to join us on this incredible journey.

HighGround is committed to our brand promise and our core values. As such, we hope and expect that you will strive to keep our clients at the center of everything you do, be honest, remain professional at all times, exhibit humility and think outside of the box like our founders did, who were pioneering and visionary when our journey began in 1930.

HighGround offers a comprehensive benefits package that includes a progressive medical plan, dental, vision, disability benefits, retirement plan and more but don't take our word for it, have a look at what other HighGrounders are saying and learn more about our benefits here:

<https://www.highgroundadvisors.org/careers>.

If you are interested in becoming a part of the HighGround team, please email your resume and cover letter to: HR@highgroundadvisors.org.