



Title: Executive Assistant (80/20 Office and Personal Support)
Classification: Full-time, exempt; onsite or hybrid
Department: Operations

Objective:

FP Transitions is seeking a professional, resourceful Executive Assistant to provide primarily business-focused support for the three Partners while also assisting with occasional light personal tasks. Roughly 80% of the responsibilities center around office, administrative, and operational duties; 20% include personal errands or coordination. This role is critical to the efficiency, effectiveness, and overall success of the executive team and the organization.

Role Summary:

The Executive Assistant is a high-impact partner to the firm's executives, providing proactive support that keeps leadership aligned, focused, organized, and moving forward. Core responsibilities include owning and optimizing executive calendars, preparing leaders for meetings and key conversations, organizing travel arrangements, tracking projects, and ensuring follow-through across commitments. This role is best suited for an experienced professional who manages competing priorities with confidence and takes pride in staying two steps ahead. Operating with a high degree of autonomy, the Executive Assistant is trusted to make sound decisions, anticipate needs, and communicate proactively when priorities shift or issues arise.

Ideal Candidate:

The ideal candidate enjoys being at the center of the action and takes real pride in making things run better than they found them. They bring sound judgment, sharp instincts, and a high level of pride to their work, understanding that great executive support is equal parts organization, discretion, and momentum. This person thinks critically, communicates clearly, and moves with confidence, even as priorities shift.

They have experience providing complex administrative support to multiple executives and are comfortable balancing a wide range of responsibilities at the same time. Tech-savvy and detail-oriented, they handle tools like Microsoft Office, particularly PowerPoint and Excel, with ease and manage high-volume workflows with accuracy, professionalism, and a positive attitude. Above all, they are highly trustworthy and dependable, with the maturity to handle sensitive information with discretion, and the confidence to operate with minimal oversight. You'll be most successful in this role if you enjoy taking full ownership of projects, making smart judgment calls, and ensuring leaders never have to wonder whether something is handled.



Essential Functions:**Office-Focused (80%)**

- Daily calendar, inbox, and workflow management for three partners.
- Prepare meeting materials, briefing documents, and follow-up notes.
- Coordinate travel, expense reporting, and meeting logistics.
- Support internal operations, project coordination, and cross-team initiatives.
- Assist with reporting, presentations, and data management.
- Maintain structured digital filing and documentation systems.

Personal Support (20%)

- Occasional errands (e.g., returns, picking up items, gifting assistance).
- Booking dinner reservations or simple personal appointments.
- Household vendor scheduling for routine items (e.g., accepting deliveries).
- Light personal travel support (no heavy lifestyle management).

Education and Experience:

- 5+ years providing complex administrative support, ideally to executives in finance, investment, or professional services.
- Experience supporting multiple executives
- Experience balancing corporate and personal tasks simultaneously.
- Project management experience. Demonstrated ability to track, manage and prioritize multiple projects and tasks simultaneously.
- Valid driver's license and clean driving record are a must.
- Demonstrated comfort with technology, including but not limited to Microsoft Office Suite (especially Excel, Word, Outlook, and PowerPoint), Slack, and Tableau.

Compensation and Benefits:

- \$65,000-\$95,000 DOE
- Medical, Dental, Vision, 401k with 25% employer match
- Accrued PTO, Company holidays (including employee's birthday)
- Company lunches, snacks, and team-building events.

