



About Litman Gregory and iM Global Partner

Founded in 1987, Litman Gregory offers wealth management services to individuals, families, and endowment and foundation organizations. Our research services are driven by strong asset allocation and manager selection expertise. Excellence and quality are core to our values, and our team of people is focused on client-centered service and collaborative connections.

Our wealth management business is based in the San Francisco Bay area, and we now benefit from a global network of professionals in 16 locations worldwide following our integration into iM Global Partner, a worldwide asset management network. Our relationships are built on trust, respect, and integrity.

We believe that **'Performance is born out of people'** and that is clearly the case for our team of hard-working, motivated employees. We are growing fast, and as we grow, so will you. We believe that our company provides an important opportunity for people to expand their skill set and make their mark. We have very high standards for our work and our investments are for the long term. This philosophy is reflected in our hiring process. We work hard to find the right fit and as a result we have a team of high performing, motivated and creative individuals

The role

The primary responsibilities of the **AVP - Office Administrator** include coordinating multi-office operations efficiently and effectively, providing administrative support to COO/CCO and directly reporting teams, as well as welcoming and receiving clients, visitors, and callers. The Office Administrator must have good judgment and significant initiative across a broad spectrum of activities and situations.

Essential Duties

Administration and Client/Guest Reception

- Leads and organizes office operations and procedures for three Bay Area office locations in coordination with other departments as needed - including office space, phone systems, requisition of supplies, and other administrative services, ensures office equipment is available and functional
- Ensures a welcoming and professional reception for callers and visitors at primary Northern California office location (Walnut Creek)
- Provides administrative support to COO/CCO and their directly reporting Compliance, Client Service and Operations teams on ad hoc basis
- Organize and schedule meetings and appointments

- Provide coordination for occasional meetings and events – setup/food/equipment/rentals/location
- Monitor receipt of all administrative invoices (shipping vendors; on-line purchases ; copier leases),approve and forward to accounting w/proper coding
- Pick up and distribute daily mail, including scanning important items and checks to recipients
- Monitor the company fax application for incoming mail
- Manage and maintain network filing systems as required
- Maintain office records in line with procedures, ensuring they are secure and that regulatory and data protection requirements are always met
- Conduct all activities in accordance with the company values, policies, and standards.

Administration and Client/Guest Reception

- Facilitate company needs with building management with occasional travel to other Northern California office locations (Larkspur, Stockton) (2-3 times per month)
- Manage relationships with office-related vendors and service providers
- Maintain supplies of snacks, stationery, and equipment across 3 office locations
- Maintain the condition of the primary office and employee kitchen during office hours and arrange for necessary maintenance and repairs
- Manage security – lockouts, keys etc. - during business hours
- Support on-boarding of new staff and office setup
- Coordinate w/parking garage management – adding/removing employee access as needed
- Act as primary point of contact for building safety training and communications
- Manage projects related to office move/relocation coordination as need arises.

Qualifications

Essential

- Experience in office administration systems and procedures
- Excellent interpersonal communication skills to interact effectively (via phone, writing, and in person) with a wide range of people including clients and prospective clients; employees; vendors, and service providers

- Strong initiative to identify needs, create and implement action plans while involving others appropriately
- Proactive, self-starter with strong attention to detail
- Effective organizational and planning skills, with an ability to multi-task and prioritize work
- Ability to identify and resolve problems in a timely manner; gather and analyze information skillfully and provide solutions
- Advanced skills with Microsoft Outlook and Suite. Adept at learning new software skills
- Physical requirements: while performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel and talk or hear. The employee is frequently required to reach with hands and arms and occasionally required to stand, walk, stoop, kneel, crouch, or crawl. The employee must regularly lift and /or move up to 10 pounds, frequently lift and/or move up to 25 pounds
- Bachelor's degree preferred or at least 5+ years related experience.

Desirable

- Experience in negotiating with suppliers and vendors
- Event planning experience

Location

This role is based in our Walnut Creek, CA office.

Litman Gregory and iM Global Partner are equal opportunity employers. We celebrate diversity and are committed to creating an inclusive environment for all employees. Litman Gregory and iM Global Partner encourage applications from people of all races, religions, national origins, genders, sexual orientations, gender identities, gender expressions, and ages, as well as veterans and individuals with disabilities.

If you are ready to join a team focused on excellence and ready to reap the rewards that come with it, then we invite you to apply with your resume and a short cover letter to recruiter@lgam.com.