



POSITION ANNOUNCEMENT

Job Title: Executive Assistant to the President and CEO

Organization: National Endowment for Financial Education

Reports To: President and CEO

Location: Denver, CO

Organization Overview:

The National Endowment for Financial Education (NEFE) is the leading private nonprofit national foundation dedicated to comprehensive, ongoing financial education through best practices in research, programs and evaluation. We believe effective financial education is a powerful force for positive change. It helps people navigate financial decision making and equips learners with the tools and confidence to chart their financial journeys. Effective financial education focuses on what works and produces strong outcomes. NEFE strives to contribute its expertise in research, education, evaluation and thought leadership to the field of financial capability. By leading and encouraging best practices and knowledge-sharing, we're committed to improving the effectiveness of financial education and raising awareness of the other factors which affect the achievement of financial well-being for all Americans.

Position Overview

The National Endowment for Financial Education is looking for someone with proven excellence in an Executive Assistant role and is committed to carrying out duties with the utmost professionalism, confidentiality and discretion. The Executive Assistant to the President and CEO provides comprehensive administrative support to the President and Chief Executive Officer, serves as the board liaison and as the corporate secretary.

Essential Duties and Responsibilities:

CEO Support

- Handles all day-to-day administrative responsibilities for the CEO; this includes and is not limited to scheduling and coordinating meetings, answering phone calls and other general administrative functions
- Prepares a daily calendar with appropriate briefing materials for the CEO
- Calendars and coordinates all meetings and keeps CEO informed of any changes; produces agendas, prepares and reviews documents and orders food/beverages, where applicable
- Builds and maintains strong working relationships with the CEO, board members, and staff
- Manages expenses, including organizing receipts and submitting for reimbursement
- Coordinates travel for the CEO
- Prepares draft agendas for biweekly calls with the board chair and vice chair

- Drafts correspondence and communication that comes from the CEO
- Prepares a draft of the CEO's monthly email update to the board
- Serves as a project manager for special projects as assigned.

Board of Directors Liaison

- Interfaces with and provides general support to the Board of Trustees
- Creates and maintains the Board of Trustees and Board committees' annual calendars
- Distributes all Board and Board committee meeting reminders, agendas, reports, special mailings and other necessary documents
- Maintains the board's policy governance manual and makes recommendations for changes
- Attends and takes minutes at all Board and Board Committee meetings; provides minutes and recap to all appropriate people
- Maintains the official Board of Trustees records and board portal
- Prepares Board packets and organizes logistics for board and committee meetings (in-person and virtual)
- Coordinates the orientation process for new board members
- Coordinates the board recognition program
- Handles all meeting logistics for the spring and fall board meetings, including identification of potential venues, contracting for a venue, and all meeting logistics

Organization Support

- As corporate secretary, maintains official records of the foundation and files timely reports with the Secretary of State's office
- Coordinates the monthly all-staff meeting, including preparation of the agenda and compilation of written reports.
- Tracks and communicates progress on the strategic plan

Position Requirements

- 5+ years of experience in a high-level administrative or executive assistant capacity
- Experience working with a board of directors/governing board
- Strong organizational skills, including attention to detail and commitment to follow up and follow through
- Must be trustworthy and able to keep matters confidential
- Proficiency in Microsoft Office - Word, Excel and Power Point
- Proficiency in Microsoft Outlook and Office 365
- Ability to remain calm under tight deadlines and be flexible and open to frequent schedule changes
- Excellent written and oral communication skills
- Outstanding interpersonal skills. Must demonstrate poise, tact and diplomacy at all times and be able to interact successfully with board members, the staff, and key stakeholders
- Must display sound, mature judgment and decision-making ability, including knowing what can be handled independently and what should be brought to the CEO's attention. Should have the confidence and ability to push back when needed
- Collaborative instincts and a sense of humor

- Intrinsically motivated individual with enthusiasm for the foundation's mission

Preferred Qualifications

- Bachelor's degree
- Experience with meeting planning

Physical/Mental Demands of the Job

While performing the duties of this job, the employee is regularly required to, stand, sit, talk, hear, and use hands and fingers to operate a computer and telephone keyboard. Specific vision abilities required by this job include close vision requirements due to computer work. Light to moderate lifting is required (e.g., 20lb box of research papers). Ability to uphold the stress of traveling. Ability to uphold the stress of working under deadlines.

Compensation and Benefits

Compensation for this position is between \$60,000-\$80,000, and commensurate with experience. NEFE offers a generous employee benefits program that includes vacation, sick and holiday leave; health, dental and vision insurance; contributions to both defined contribution and defined benefit retirement plans; and a host of additional benefits.

Application Instructions:

To apply, please email cover letter, resume, and list of references to hr@nefe.org with **Executive Assistant** in the subject line.

No phone calls. Application materials must be received by 5:00 pm on Wednesday, December 11th.

NEFE is an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, national origin, disability status, protected veteran status or any other characteristic protected by law.