# **Designation:**

Executive Assistant

# **Company Profile**

Asset Vantage was founded in 2011 by a family office and technology group as a next-generation, SaaS technology-based asset management, accounting, and reporting system catering to the highly demanding needs of customers ranging from individual wealth holders to fully staffed family offices and those professionals that serve them. ***Our vision is to empower families and their trusted advisors to make better investment decisions with a complete picture of their wealth.***

Our fully configurable family office software platform provides financial data aggregation across all asset types, an integrated general ledger for accounting/reconciliation and comprehensive portfolio reporting/analytics across all asset classes, currencies, advisors, and geographies.
***We are the one-stop software solution to help family offices run like a business.***

More than 300+ of the world’s wealthiest families, representing combined assets of over USD 300 Billion in value, use our platform to automate their operations to drive better financial outcomes. We serve them through single-family offices, multi-family offices, CPA firms, trusts and financial institutions. ***AV has the distinction of being the only platform that’s truly global serving users across the Americas, UK, Middle East, Asia, and Oceania.***

AV’s best-in-class technology, combined with its premium managed services, offers an unparalleled and highly configurable solution at a fully transparent and competitive price point. ***The holy grail of value that family offices have always been searching for is now here.***

For more information, visit [www.assetvantage.com](http://www.assetvantage.com)

# **Job Roles & Responsibilities:**

* Act as the point of contact among executives, employees, clients, and other external partners
* Manage information flow in a timely and accurate manner
* Manage executives’ calendars and set up meetings
* Make local and international travel arrangements including visa, tickets, car, hotel, with a detailed travel itinerary (online).
* Rack daily expenses and prepare weekly, monthly, or quarterly reports
* Act as an office manager by keeping up with office supply inventory
* Format information for internal and external communication – memos, emails, presentations, reports.
* Take and manage detailed minutes during meetings.
* Briefing and summary briefings prior to meetings.
* Coordinate and setup customer meetings India and global.
* Screen and direct phone calls and distribute correspondence.
* Organize and maintain the office filing system.

# **Technical Skills:**

* Work experience as an Executive Assistant, Personal Assistant, or similar role
* Excellent MS Office knowledge

# **Personality & Interpersonal Skills:**

* Outstanding organizational and time management skills
* Excellent verbal and written communications skills
* Discretion and confidentiality

# **Qualifications and Experience:**

* 7-10 years experience
* Bachelor's degree required or equivalent work experience.

# **Location:**

**Mumbai**

**Working Days: - Monday to Friday in work from office mode**