



MERISTEM FAMILY WEALTH

FAMILY BEYOND THE NUMBERS®

Meristem is a federally-registered investment advisory firm founded in 1999 with offices in Minnetonka, Naples, Scottsdale and a South Dakota based Trust Company. We are seeking an Administrative Assistant to add to our corporate administration team.

ADMINISTRATIVE ASSISTANT POSITION SUMMARY

The Administrative Assistant will promote the vision and mission of Meristem by supporting the daily activities of the Client Functions, Office Functions and HR. This role will also partner with the Executive Assistant, Administrative Manager to provide support to the executive team.

I. ESSENTIAL FUNCTIONS AND DUTIES

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily:

- A. Support Client Functions:
 - CIO/Investment Team
 - Support CIO – calendar scheduling and expenses
 - VP of Investments – occasional calendar scheduling and expenses
 - Scheduling of various internal and external meetings, across mediums – in-person, conference and video calls
 - Client Advisor Team
 - Schedule meetings
 - Expense reports
 - Additional support, as requested
 - MTC Support
 - Coordinate internal paperwork process for new trusts
- B. Office Functions
 - Partner with Front Desk Coordinator
 - Daily Back up (lunches, breaks, meetings, PTO as designated)
 - Start morning coffee upon arrival
 - Kitchen duties (dishwasher/lunch meeting prep/groceries)
 - Assist with employee events (summer/winter)
 - Coordinate mail (pick up/sort/deliver to mail files and take mail down end of day)
 - Notary (occasionally notarize docs for clients or employees)
- C. Human Resources:
 - Maintain phone lists, org charts, title list, manage all office/cube keys
 - Assist with coordination of the interview process/new hire welcoming:
 - Decline letters
 - New hire paperwork
 - Welcoming gear and office/work station setup
 - Termination process
 - Assist with the maintenance of the HR files

(Administrative Assistant ... see page 2)

- PTO:
 - Add to group calendar/track on spreadsheet
 - Mid-year review and year-end audit
 - Create and circulate individual tracking sheets each year

D. Support to Executive Assistant, Administrative Manager

- Assist in various office projects
- Back up to Executive team as warranted

II. REQUIRED KNOWLEDGE, SKILLS AND ABILITIES

A. The requirements listed below are representative of the knowledge, skill, and/or ability required in this job position.

- Resourceful, adaptive to change, flexible, able to multi-task, and prioritize competing demands in a high energy/high pressure environment
- Strong attention to details
- Warm presence with the ability to collaborate across various functions/individuals using tact and poise, both verbally and in person
- Independently solve complex issues
- Ability to quickly learn new technologies and skills
- Commitment to mission of organization
- Proficient in Microsoft products – Word, Excel, PowerPoint

B. Demonstrate Meristem’s Core Values

- Client-First Mentality
- Passion for the Craft
- Humble
- Driven to Succeed
- Collaborative and Responsible
- Evolving and Innovative

III. MINIMUM EDUCATION AND EXPERIENCE

Minimum Associates degree in Business, Communications or equivalent on the job experience

IV. PHYSICAL DEMANDS

The physical demands described herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing all duties of this job position, the employee must be able to work at least 8 hours per day, and must be able to communicate with the public. He or she is regularly required to sit; stand, bend from the waist, lift up to 50 lbs, write, operate the computer and all office equipment, use the phone; speak intelligibly; and hear.

This job description is intended to describe the general nature and level of work being performed by employees assigned to this position. It is not intended to be an entire list of all activities, tasks and skills required of employees in this position.

FULL TIME/NON-EXEMPT

Department: Corporate General and Administrative

Reports To: Executive Assistant, Administrative Manager

