



CalTRUST

Position Description Executive & Shareholder Services Assistant

Background

CalTRUST is a joint powers authority that was established to give California public agencies an investment tool to diversify their investment portfolio. As a local government investment pool, CalTRUST offers five fund options and currently holds over \$2.2 billion in assets for over 140 California public agencies. CalTRUST is a small-staff organization governed by a Board of Trustees.

Job Description

The Executive & Shareholder Services Assistant is responsible for providing senior level administrative support to the Chief Executive Officer and to do related work as required. In addition, this position is responsible for providing customer service to CalTRUST shareholders. This is a full-time, non-exempt position and requires minimal travel. CalTRUST is a Sacramento-based entity but CalTRUST staff is able to work from any remote location within the State of California. The ideal candidate will possess a strong attention to detail, excellent interpersonal skills, interest in ongoing professional development, and embrace the challenge of being part of a small, high-functioning team in a remote environment.

Job Duties

- Provides necessary support to the Chief Executive Officer, which may include booking meetings, calendar management, screening calls, and other duties as assigned.
- Performs various routine clerical duties, utilizing standard office equipment, to include: screening incoming calls; taking and transmitting messages; pulling information from databases; performing data entry; and word processing.
- Supports monthly financial management tasks, such as compiling invoices and expense reports.
- Attends CalTRUST Board and Committee Meetings, takes thorough notes, and drafts meeting minutes.
- Provides support and assists with preparation and onsite management of CalTRUST Board Meetings and other CalTRUST events.
- Assist participants in updating their account information.
- Keeps records of participant interactions or transactions, recording details of inquiries, complaints, or comments, as well as actions taken
- Refers unresolved participant issues to designated personnel.
- Maintains participant records and enters data in Salesforce database.
- Posts updates to CalTRUST website.
- Performs data entry.
- Conducts research projects.
- Other duties as assigned.

Knowledge & Skills Required

- Sharp attention to detail.
- Excellent communication and interpersonal skills. Excellent active listening skills in giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Communicate effectively, verbally and in writing.
- Customer service principles.
- Establish and maintain effective working relationships with internal staff, public officials, business partners, as well as current and prospective participants.
- Basic filing and recordkeeping principles.
- Organize and accomplish work with a high degree of independence and initiative.
- Complete work assignments under pressure to meet deadlines.
- Problems solve and prepare potential solutions.
- Ability to analyze and research complex issues.
- Proficiency in Office suite software (Word, Excel, Outlook, PowerPoint) as well as Adobe Acrobat.
- Experience in Salesforce database desired, but not required.
- Experience in Wordpress desired, but not required.

Minimum Qualifications

High School Diploma or G.E.D., and three years progressively responsible office, customer service or secretarial experience; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

Salary & Benefits

Salary commensurate with experience. CalTRUST offers a comprehensive benefits package including full medical, dental, and vision coverage for the employee and his/her dependents, life insurance benefits, and participation in a defined benefit retirement program.

How To Apply

Application deadline is September 10, 2021. Submit resume, cover letter, and salary expectation to Laura Labanieh, Chief Executive Officer, apply@caltrust.org. Please be sure to include in your email which position you are applying for. Applications must be directly submitted via email, auto-generated submissions through LinkedIn or other platforms will not be considered.