

# **Executive Assistant**

## **Who we are:**

Poe Group Advisors helps CPAs navigate significant change in their careers. We are a fast growing company and the premier accounting practice intermediary firm in the industry, with offices headquartered in both Charleston and Ontario. We facilitate accounting firm sales across the U.S. and Canada, guiding sellers and buyers to maximize value and minimize risks. Our diverse team, blending in-person and remote staff, embodies trust, collaboration, and results while fostering a culture of generosity and friendliness.

## **Our Core Values:**

At Poe Group Advisors, our five core values shape everything we do:

1. High trust in our relationships with clients and teammates
2. Results-driven focus on successful outcomes
3. Collaborative and candid communication to ensure mutual success
4. Friendly and balanced environment that combines professional excellence with personal well-being
5. Generosity toward the accounting community through continuous education and knowledge-sharing.

These values enable us to effectively guide CPAs through career-defining transitions while maintaining our position as trusted industry leaders across the U.S. and Canada.

## **What we're looking for:**

We are seeking a highly organized and experienced Executive Assistant to join our team. This role is pivotal in providing high-level administrative support to our CEO/Founder, as well as other leaders during busy seasons. The ideal candidate will be a proactive, detail-oriented professional with a strong ability to prioritize tasks and manage time effectively. This person will have a passion for helping others and align with our core values.

In the future, there is an opportunity for this person to grow their number of hours through some sales appointment setting work, if desired. This would be available starting next year and is something we can discuss more with the right candidate!

## **You're a great fit if:**

The ideal candidate will have at least two years of experience as an Executive Assistant or a similar role. You possess exceptional organizational and time-management skills, enabling you to handle multiple responsibilities in a timely manner. You are a self-starter with excellent communication skills, a positive attitude, and the ability to thrive in a fast-paced environment.

## **Key Role Responsibilities:**

- Inbox maintenance, scheduling, and travel booking for the CEO
- Process invoices and maintain accurate financial records
- Monitor and respond to inquiries from HubSpot form submissions

- Conduct light research on leads to better understand their firm size, specialty, and potential fit
- Miscellaneous administrative tasks as assigned

#### **Requirements:**

- At least 2 years of experience as an Executive Assistant
- College education preferred but not required
- Strong organizational and time-management skills
- Exceptional written and verbal communication skills
- Ability to conduct basic research
- Technologically savvy
- Highly organized
- Ability to prioritize tasks and manage time effectively
- Email and calendar management knowledge
- Positive attitude and strong work ethic
- Ability to work independently and as part of a team
- Critical thinking skills
- Positive attitude

#### **Compensation & Schedule:**

- Part-Time, Contract, role (15-20 hours/week)
  - Additional hours possible in the future
  - This role has some flex in required hours throughout the year
- \$30-\$40/hour
- In office with some WFH to be determined

#### **Next steps:**

- Complete the online application, [linked here](#), and submit a copy of your resume
- If advanced, a member of the hiring team will schedule a 15 minute phone interview, invite candidates to take an online Kolbe personality assessment, and invite finalists to a 30 minute Zoom interview
- There will be a paid sample project submission as part of the screening process
- The final interview will be held in the office with the Leadership Team
- 3 references will be requested and contacted