

EXECUTIVE ASSISTANT

LVW Advisors is seeking a highly organized, proactive Executive Assistant to support the CEO. This full-time position is a key role for someone who thrives in a fast-paced, professional environment and enjoys a diverse set of responsibilities — from managing complex schedules to curating an executive's online presence.

The ideal candidate will bring prior experience supporting C-suite executives, be adept with social media and digital tools, and have exceptional organizational and communication skills. This role offers an exciting opportunity to work directly with senior leadership in a nationally recognized investment advisory firm. Remote work arrangements will be considered for highly qualified candidates.

KEY RESPONSIBILITIES

Executive Support:

- Manage the CEO's calendar, email, and rapidly changing travel logistics
- Ensure day-to-day operations run smoothly and efficiently
- Assist with monthly expense reporting in coordination with the company's policy and external CPA
- Prepare briefing materials, presentations, and reports for meetings and public appearances
- Support the CEO with materials and coordination for speaking engagements, board meetings, podcasts, and business development meetings

Client Engagement:

- Serve as a liaison between the CEO and key clients
- Schedule meetings, coordinate communication, and manage follow-ups
- Foster strong client relationships through thoughtful outreach and personalized gestures

Social Media & Digital Presence:

- Oversee and implement the CEO's social media strategy
- Create and curate content to elevate brand visibility and engagement
- Analyze performance metrics and adjust strategy accordingly

QUALIFICATIONS & SKILLS

- Bachelor's degree in business or related field (preferred)
- Minimum 3 years of experience as an Executive Assistant, ideally supporting C-suite executives
- Experience in the investment or financial services industry is a plus
- Exceptional attention to detail and time management
- Highly proficient in Microsoft Office Suite (Excel, Word, PowerPoint)
- Familiarity with Outlook, CRM systems, and social media platforms
- Strong written and verbal communication skills
- Creative thinker with the ability to manage multiple priorities and projects
- Discreet, professional, and able to handle confidential information with integrity
- Collaborative mindset with a positive, proactive attitude

ABOUT THE FIRM

LVW Advisors is an independent Rochester-based Registered Investment Adviser. Our team of experienced financial advisors provides customized investment management solutions and comprehensive wealth management plans for institutional investors, individuals and family offices. LVW Advisors is consistently recognized in the industry for sophisticated wealth management, research capabilities and the delivery of an exceptional client experience. For more information, visit our website at lvwadvisors.com.

LVW Advisors is an Equal Employment Opportunity employer Minority/Female/Sexual Orientation/Gender Identity/Individual with Disability/Protected Veteran. We welcome all persons to apply.