

ABOUT THE COMPANY

We are a boutique asset management firm consisting of a small, highly efficient team of professionals. Our business is built on efficiency, flexibility, integrity and accountability.

ABOUT THE ROLE

We're looking for someone with a can-do attitude to join our team on a parttime basis.

Title	Personal Assistant
Location	100% office based (Gardens, Cape Town)
Hours	Monday – Thursday (half day) Semi flexible hours (08h00 – 12h30 / 09h00 – 13h30 / 10h00 – 14h30)
Reporting to	Operations Manager
Availability	Immediately
CTC	depending on experience secure parking bay will be provided

This position may grow into a full-time offering depending on the candidate's availability, aptitude, and performance.

DUTIES & RESPONSIBILITIES

Tasks include, but are not limited to:

- Diary and e-mail inbox management (including domestic & international travel arrangements)
- Reception duties (receiving guests and offering beverages, receiving deliveries, validating parking tickets, etc.)
- Telephone management
- Planning and managing marketing events (golf days, lunches, investor feedback sessions, etc.)
- Filing, scanning and maintenance of electronic records
- Drafting / compiling / formatting documents
- Maintaining office supplies and managing ad hoc office requirements

- Liaise with service providers, clients and other stakeholders
- Maintenance of regulatory registers (e.g. Training / CPD registers, Competence registers, Conflict of interest registers)
- Submission of electronic and other ad hoc regulatory requirements (CIPC, FSCA, etc.)
- Collating regulatory requirements for investor transactions
- Maintenance of client records
- Maintaining existing company policies (reviews, updates)
- Distribution of ad hoc client communication
- Assist with investor transactions (onboarding, redemptions, additional investments, etc.)

SOFT SKILLS

- Highly organised and efficient time & task management – results driven
- Resourceful, logical problem solving, practical thinking, ability take initiative
- Strong ethical compass, honesty and integrity
- Impeccable business acumen and professionalism (written, verbal)
- Ability to interpret and execute instructions effectively and efficiently (written, verbal)
- Attention to detail
- Resilient and reliable

NON-NEGOTIABLE

- Experience in Financial Services / Asset Management industry (2+ years)
- Residing in Cape Town
- English 1st or 2nd language
- Own reliable transport and drivers license
- Fully computer literate and tech savvy
 - MS Office – especially Outlook, Word and Excel
 - Dropbox