

JOB DESCRIPTION

TITLE: Family Enterprise Advisor, Program Coordinator
REPORTS TO: Manager, Family Enterprise Advisor Program
STATUS: Fulltime permanent

The Family Enterprise Xchange (FEX) is a non-profit, national membership organization for business families and their advisors. Our goal is simple: to empower enterprising families and their advisors with the resources and support they need to succeed and flourish.

The Family Enterprise Xchange is the home of the world class Family Enterprise Advisor (FEA) Program and FEA Designation. This year long executive education program helps advisors such as lawyers, accountants, wealth managers, insurance consultants to business families augment their technical skills and reinforce their standing and expertise in a growing and critical sector of the business world and demonstrate their commitment to Business Families.

WHAT WE WANT:

We're looking for a highly motivated individual to coordinate the logistics of the Family Enterprise (FEA) Program and Designation as well as supporting the FEA Team with new initiatives related to the continued growth, development and improvement of the FEA business. The position will include but not be limited to:

- Coordinate the FEA Program including booking venues, hotels, travel, catering in multiple cities
- Responsible for updating, printing and delivery of all program materials including slide presentations, binders, pre-reading, copyright approval, class hand-outs, seating plans, stationary, tent cards, name tags etc.
- Send out welcome package, class reminders and respond to correspondence from participants
- Coordinate written and oral exam process including, scheduling locations, adjudicators, travel, hotels as well as ensuring appropriate material is delivered and certificates printed and framed
- General administrative support where required

YOU ARE:

Enthusiastic, energetic, highly organized, detail oriented with a desire to continually improve and learn. You are comfortable working collaboratively in a small team and have a desire to succeed and grow with this organization. In addition, you will have:

- Post-secondary education, preferably in business administration or comparable experience



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- Minimum 2-3 years administrative experience
- Excellent communication (written & verbal) skills
- Excellent customer service skills
- Experience with CRM or AMS systems a plus
- Proficient in Microsoft Office Suites