
Job Title: Investor Relations Administrative Assistant Job Category: Non-exempt
Location: Ladera Ranch, CA | Corporate Office Reports to: IR Operations Manager

JOB SUMMARY

The **Investor Relations Department** is a collaborative, innovative Real Estate Investment Firm's operations department and in-bound call center that strives to process transactions accurately and efficiently in a fast-paced environment while simultaneously providing a positive customer experience and promote best-in-class service. The department is looking for an **Investor Relations Administrative Assistant** to join our results driven team. This opportunity is ideal for a talented and resourceful professional who is eager to become a member of an accomplished team and play a part in our continued growth and success.

JOB DUTIES AND RESPONSIBILITIES

Responsibilities include, but are not limited to the following:

- Assist investors and internal and external sales teams with inquiries and/or problem resolution in a professional and composed manner, and escalate to manager as appropriate
- Accurately and efficiently process transactions to include (but are not limited to) purchases, transfers, adjustments, account maintenances and redemptions
- Processing may include document review, entry of data, checking of work to ensure accuracy of transactions and preparing reports, confirms, statements and communications
- Review spreadsheets and information with heavy emphasis on quality control, daily, weekly and month-end balancing
- Provide excellent customer service answering inbound and making outbound calls and email communications. Respond to telephone inquiries regarding account status (i.e. account balances, new trades / maintenance history, etc.) and keeping records of customer interactions
- Work in conjunction with other divisions or departments in order to meet departmental quality standards and ensure a smooth flow of operation
- Additional responsibilities may include creating reports, distributions, researching account inquiries utilizing various resources, responding to written customer inquiries, and assisting other departments and management with special tasks as needed
- Follow established policies, procedures and guidelines to protect both our customers and Company
- Abide by all timekeeping policies and procedures, ensuring to clock all work time and take all meal and rest breaks as required.

QUALIFICATIONS AND COMPETENCIES:

- Demonstrate a high level of professionalism and confidentiality
- Naturally collaborative, is a team player and enjoys interacting with individuals at all levels

- Strong attention to detail, accuracy, and great time management skills
- Self-motivated, successfully multi-tasks, works well under pressure and responds to shifting priorities
- Excellent oral and written communication skills and has a desire to provide excellent service
- The ability to produce quality results in an efficient manner within tight timeframes and simultaneously manage several projects. Independently plan and conduct non-routine financial analysis/reporting projects
- Understand and apply financial analysis methodologies to achieve/produce a desired result
- 2-4 years of relevant experience at an investment management, wealth management, investment consulting, or financial services firm
- Experience in investor relations required
- Proficient computer skills, in Microsoft Word, Excel, Outlook/eagerness to learn new skills and software systems
- Prompt and consistent attendance

PHYSICAL REQUIREMENTS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. SmartStop considers all individuals on an equal basis. Our policy is to employ the most qualified applicants. Reasonable accommodations will be made to enable qualified individuals with disabilities to perform the essential functions of this job.

- Able to sit, stand, walk and use hands and fingers to operate a computer keyboard, mouse, and telephone to talk and hear.
- Frequently sit and reach with hands and arms.
- Occasionally lift and/or move up to 20 pounds
- Able and available to work 32 to 40 hours per week on average.

SmartStop is committed to providing reasonable accommodations for candidates with disabilities in our recruiting process. If you need any assistance or accommodations due to a disability, please let us know.

DIVERSITY

SmartStop Storage Advisors LLC, is fully committed to diversity, equity and inclusion. We will not tolerate discrimination in employment, employment decisions, or in business dealings on the basis of race, color, creed, gender, gender identity, gender expression, transgender status, age, sex, sexual orientation, religion, disability, ethnicity, national origin, ancestry, citizenship status, veteran status, marital status, pregnancy, political affiliation, status as a parent or any other legally protected status. We believe in fostering an environment of inclusion, and seek contributors from all backgrounds to join our dynamic team. SmartStop is proud to be an Equal Opportunity Employer.

Disclaimer: This job description is only a summary of typical job requirements and is not an exhaustive or comprehensive list of all possible job responsibilities, tasks, or duties.

**EMPLOYEE ACKNOWLEDGES THAT THEY HAVE RECEIVED AND REVIEWED THIS JOB DESCRIPTION.
THE SIGNATURE BELOW CONSTITUTES EMPLOYEE'S UNDERSTANDING OF THE REQUIREMENTS,
ESSENTIAL FUNCTIONS, AND DUTIES OF THE POSITION.**

Employee Name _____

Employee Signature _____

Date _____