

Administrator to General Counsel

Certified Financial Planner Board of Standards (“CFP Board”) – headquartered in Washington, D.C. – is the certifying body for financial planning professionals. It is a non-profit organization that fosters professional standards in personal financial planning through its setting and enforcement of the education, examination, experience, ethics, and other requirements for the CFP® certification.

CFP Board seeks a highly motivated team player to serve as Administrator to the General Counsel to provide a variety of day-to-day administrative and programmatic tasks and also provide additional support to the Professional Standards and Legal team.

The ideal candidate will embrace open collaboration, possess intellectual curiosity and help the organization deliver results towards fulfilling our mission.

Essential Functions:

- Performs a wide range of administrative support tasks in support of the work of the General Counsel, including maintaining and updating contacts; taking minutes; developing presentations and speeches, and preparing for meetings and conferences any other items necessary for successful execution of assignments
- Reviews, proofreads and edits documents prepared for the General Counsel’s signature, composes letters and memoranda
- Responsible for General Counsel’s calendar; requiring interaction with both internal and external executives and assistants, to coordinate a variety of meetings, conferences and calls
- Makes travel arrangements, prepares accurate and detailed itineraries
- Provides support to the Director of Adjudication with matters pertaining to the administration of CFP Board’s disciplinary adjudication function including by: communicating with volunteers; scheduling; compiling and distributing hearing materials; preparing, distributing, and managing hearing conflict surveys and responses; preparing and transmitting written materials, including draft press releases, orders, and other correspondence
- Serves as a point person for meetings for Councils, Commissions, and Working Groups, to include: preparing agenda, collecting, developing and compiling briefing materials; event set-up and other logistics
- Assists with volunteer development and retention, including by: conducting outreach to potential volunteers; serving as the department’s primary administrative contact with volunteers; and attending to volunteer issues and concerns.
- Assists with coordinating the collection and tracking of the execution of Volunteer Agreements by all CFP Board volunteers.
- Assists with conducting background checks for CFP® certification candidates, CFP Board volunteers, and Board members, as requested by the General Counsel.
- Maintains position reference materials, including standard operating procedure documents.

- Prepares expense reports and departmental billing.
- Performs other duties as assigned.

Background/Skills/Abilities Preferred

- A minimum of 4 years administrative or program support, or commensurate educational experience.
- Excellent calendar management skills, including the coordination of complex meetings.
- Proficiency in MS Office suite.
- High level of professionalism, creativity and ability to work well with all levels of internal management and staff, as well as CFP® certificants, volunteers and vendors.
- Motivated self-starter with the ability to prioritize and manage multiple projects simultaneously, and follow through on issues in a timely manner.
- Ability to make sound decisions and strong critical thinking skills.
- Outstanding attention to detail.
- Exceptional written and oral communication skills.
- Demonstrated ability to deal with confidential/sensitive matters in a discrete and professional manner.
- Ability to adapt quickly and readily to change.
- Ability to work and collaborate as a part of a motivated, driven team.

To apply, send your resume and one-page letter summarizing your interest, qualifications and salary expectations. Please reference the Administrator to General Counsel position in your cover letter. Email your application to humanresources@cfpboard.org, Attention: Director, Human Resources, CFP Board, 1425 K Street NW, Suite 800, Washington, DC 20005.

CFP Board believes that diversity of experience and perspective are strengths and seeks to continue to grow a highly committed, skilled and collaborative staff.