

INTERCONTINENTAL

Position Description

TITLE: Administrative Officer
REPORTS TO: Paul Nasser
DEPARTMENT: Institutional Services

DATE: 9/20/2021
FLSA: Exempt

JOB PURPOSE: Provide business and administrative support to the Institutional Services Group as needed. Help facilitate the workflow process.

DUTIES AND RESPONSIBILITIES:

- Provide administrative support to Institutional Services team including but not limited to, UPS labels and mailings, calendar invitations (Outlook) and check requests.
- Assist with the development and implementation of client service policies and procedures.
- Print, bind, and mail of presentation books.
- Organize and maintain supplies needed for presentation books.
- Assist Operations manager with mailings of Capital Distribution Notices, Quarterly Reports, etc.
- Enter and organize general client information into the CRM System (Salesforce).
- Maintain Fund files and Intercontinental Library.
- Weekly Report consisting of outstanding balance subscriptions and other Fund matters.
- Support sales team with market research.
- Synthesize and report key client information from the CRM System for the sales team.
- Assemble marketing materials and presentations for conferences, ad campaigns, and other events as necessary.
- Work with Operations Manager for initiatives of web and client extranet development and maintenance.
- Coordinate institutional investor focused events.
- Understand and comply with provisions of SEC and federal regulations.
- Serve as ambassador of Intercontinental, all employees must maintain appropriate conduct and professionalism. This extends to every internal and external business contact or meeting, including trips outside the company to attend conferences, seminars, and lectures.
- Maintain confidentiality and protect the operations by keeping information confidential.
- Maintain professional and technical knowledge.

QUALIFICATIONS:

- Bachelor's Degree (BA, BS)
- Investment management experience a plus.
- Strong interest in real estate, finance and/or investment management industry.
- Strong writing, communication and interpersonal skills.
- Proficient knowledge with Microsoft Applications (Excel, Word, PowerPoint, Outlook).
- Knowledge of Adobe applications (Acrobat, Illustrator, InDesign) a plus.

Approval and Effective Dates:

Date: 9/20/2021



Paul J. Nasser, CFO/COO