



Senior Executive Assistant

Location: Remote

Reports to: Chief Strategy Officer (CSO)

Job Type: Full-Time / Exempt

About the Role

Foundation Specialty Finance is seeking a highly organized, detail-driven Executive Assistant to support the Chief Strategy Officer (CSO). The CSO manages multiple business functions across the organization, including licensing and compliance, marketing, borrower engagement, operations, technology integrations, and business development.

This role is designed for someone who can manage high volumes of task tracking, professional communications, licensing coordination, and cross-functional execution — while navigating fast-moving priorities and supporting the CSO's extended hours.

While executive support is the core function, the role also includes light marketing assistance such as updating branded presentations, tracking outreach tasks, and maintaining marketing folders. Candidates must be comfortable working independently, handling time-sensitive matters, and executing on both routine and strategic tasks across departments.

Key Responsibilities

Executive & Administrative Support

- Draft, format, and edit Word documents (letters, contracts, filings, internal reports)
- Create, update, and polish PowerPoint presentations and investor decks
- Convert between file formats (PDF ↔ Word ↔ PowerPoint) with consistency and quality control
- Maintain and edit workflow diagrams and org charts in Visio
- Track tasks and deadlines in Asana, ensuring all deliverables stay on track
- Take meeting notes and translate them into actionable task lists
- Proactively follow up with internal stakeholders and provide the CSO with daily status updates
- Respond to emails or draft messages on behalf of the CSO as directed
- Maintain and organize OneDrive files with accurate version control and structured folder systems
- Be available for time-sensitive requests or deliverables outside standard hours
- Prepare branded documents for internal and external use

Licensing & Compliance Support

- Track licensing renewal deadlines, officer/broker updates, and DBA registrations across multiple states
- Manage compliance calendar and coordinate reminders for filings, deadlines, and required legal updates
- Support NMLS and California DRE filings, including new state license applications, amendments, and name changes
- Liaise with licensing agencies and filing services to ensure accuracy and timely processing
- Assist with compiling and submitting supporting documentation for DFPI/DBO renewals and regulatory requirements
- Maintain and organize digital records of all applications, supporting documents, certificates, and communications



- Coordinate updates to internal licensing matrices, contact lists, and license status trackers across entities and DBAs
- Assist with drafting cover letters, checklists, and follow-up emails to regulators, attorneys, or filing agents as needed

Project Coordination

- Coordinate deliverables between teams including compliance, borrower engagement, operations, marketing, and technology
- Manage cross-functional timelines and internal status check-ins

Events & Logistics

- Plan, coordinate, and support logistics for webinars, conferences, trade shows, and industry events
- Prepare event-specific materials, including presentations, flyers, and promotional assets

Additional Duties

- Use ChatGPT and AI tools to support drafting, research, formatting, and data summarization
- Protect confidentiality and maintain professionalism in all internal and external communications
- Perform other tasks as assigned to support CSO priorities across the organization

Experience & Skills Required

- 3+ years in an executive assistant, licensing/compliance coordinator, or operations admin role
- Strong proficiency in Microsoft Office (Word, Excel, PowerPoint), Asana, and Visio
- Experience working with licensing agencies such as NMLS and DFPI/DRE
- Highly detail-oriented, deadline-driven, and able to manage multiple projects concurrently
- Strong written communication skills, including email drafting, memo preparation, and formatting
- Comfortable using ChatGPT or similar tools to support document drafting and research

Technology & Tools Expertise

- Microsoft Office Suite: Word, Excel, PowerPoint, OneDrive, SharePoint, Visio
- Asana (or similar): Task tracking, project coordination, internal reporting
- HubSpot or CRM: Basic campaign management and contact tracking
- Canva: Social graphics, presentations, branded materials
- ChatGPT or AI tools: Research and drafting support

Additional Qualifications

- Basic knowledge of Adobe Creative Suite is a plus (Photoshop, Illustrator, InDesign)
- Knowledge of SEO, PPC, and email marketing best practices is a plus
- Bachelor's degree in Business, Marketing, Communications, or related field preferred
- Must be self-motivated, proactive, and able to anticipate needs and take initiative