



Excel Federal Credit Union Job Description

Position: Administrative Assistant/Office Administrator

Position Status: Full-time non-exempt(hourly)/no supervisory responsibilities

Reports To: Reports to President & CEO

Date: 12/9/2025

Scope: Provide confidential, professional, and administrative assistance for the CEO and management staff that will support key administrative functions across various departments, ensuring smooth operations and efficient use of office resources. Interface with other managers in the credit union, with board members, with members, visitors, and vendors to the credit union. Prepare reports, correspondence, manuals, spreadsheets, and all other communications utilizing a broad range of computer applications. The ideal candidate is proactive, adaptable, and able to handle multiple priorities with ease.

Essential Duties & Responsibilities:

- Provides a variety of administrative activities necessary to assist the CEO and management including research, report preparation, informational requests, and clerical support.
- Manage and prepare board material, record and distribute board agenda and minutes.
- Manage, schedule or arrange appointments, logistics, meal planning, travel, seminar arrangements, meetings, business trips, etc. for CEO, board members, or other members of the senior management team.
- Manage daily sorting, distribution, and handling of incoming mail, ensuring timely delivery and appropriate routing.
- Logistical event planning for meetings, including rental space, conference room reservations, meal orders, technology needs, reminders to attendees, etc.
- Act as the main point of contact for internal and external communications, including handling visitor inquiries, phone calls, and vendor visits.
- Monitor and manage vendor system (CUVM) for duplicate entries within the database, ensuring accurate and up-to-date records.
- Maintain and update office phone list, email distribution lists, and other similar systems.
- Oversee, restock, and maintain responsibility for general office upkeep and "look and feel." This includes keeping kitchen and supply areas stocked, clean and functional, and office equipment working.
- Participate as needed in special projects and community events.
- Handle other tasks assigned as assigned.

Knowledge and/or skill qualifications:

- 2-5 years of experience in an administrative role, ideally in a banking or financial setting
- Exceptional organizational and time management skills
- Strong communication skills with the ability to interact across all levels of the company
- Proficiency with Microsoft Office and Google Suite, Teams, Zoom
- Attention to detail and ability to handle multiple priorities efficiently
- Strong problem-solving skills and analytical abilities

Education:

Minimum of two-year college degree. 2+ years successful experience working with executive-level staff; Previous experience as an Office Administrator (OA), Operations Manager (OM), Executive Assistant (EA), or Administrative Assistant.

Physical Requirement:

Must be physically able to operate a variety of automated office machines such as calculator, computer, printer, facsimile, telephone, copier, etc. Must be able to stand, bend and stoop as needed. Must be able to lift and/or carry weights of up to 20 pounds.

Work Setting:

- In-Person at the Peachtree Corners, GA location
- Typically works a 9 AM - 5 PM schedule but may occasionally need to adjust hours to come in earlier or stay later to assist with business needs or events.