



Emily Greer

Sr. Executive Assistant to the CEO

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SUMMARY

Senior Executive Assistant with 10 years supporting CEOs, presidents, and global **leadership** teams across **insurance** and financial services. Trusted partner for complex **calendar management**, executive communications, international travel, meeting preparation, confidential information, and cross-functional initiatives across Chicago and Oak Brook offices. Advanced Microsoft Word, Excel, PowerPoint, Outlook, and Copilot user who improves workflows, resolves competing priorities, and prepares leaders for high-stakes decisions. Experience includes customer executives, government officials, NGO representatives, internal business leaders, recruiting materials, expense reporting, risk awareness, and organizational processes. A **bachelor's degree** and Microsoft certifications support practical administrative judgment. Ready to bring calm coordination, careful research, and discreet follow-through that helps senior leadership protect focus and move enterprise priorities forward.

EXPERIENCE

Senior Executive Assistant to the Chief Executive Officer

Northstar Risk Partners 📅 December 2021 - Present 📍 Chicago, IL

Supports CEO priorities across Chicago and Oak Brook offices, coordinating board activity, customer engagements, regulatory discussions, global leadership, travel, briefings, and enterprise initiatives. Serves as a discreet contact for senior stakeholders while partnering with Executive Assistants, Strategic Assistants, and **Centers of Excellence**.

- Rebuilt Outlook and Copilot **scheduling** workflow with priority codes, improving conflict control and executive meeting readiness.
- Coordinate domestic and **international travel** with itineraries, accommodations, logistics, and timely expense report submission.
- Prepare CEO briefing books through research, Excel analysis, PowerPoint synthesis, and disciplined follow-up tracking.
- Route sensitive matters for customers, government officials, **NGO representatives**, and global leaders with sound judgment.
- Lead **cross-functional administrative** initiatives that standardize meeting protocols across enterprise leadership teams.
- Maintain integrated calendars across Chicago and Oak Brook for board, regulatory, customer, and global priorities.

Executive Assistant, Office of the President

HarborPoint Mutual Insurance 📅 January 2019 - November 2021 📍 Schaumburg, IL

Supported president and three senior leaders across underwriting, claims, risk, finance, and international business. Coordinated calendars, travel, board cycles, leadership communications, recruiting materials, and process standards that gave a broader leadership team clearer operating rhythm.

- Built annual **Outlook** and Excel **planning** calendar covering board cycles, policy reviews, forums, and travel windows.
- Managed multi-city executive travel with **accommodations**, transportation, meeting rooms, briefing materials, and expense documentation.
- Created meeting summaries and action trackers that gave owners clear deadlines and status visibility.
- Reviewed **confidential** correspondence, recruiting materials, and executive reports before distribution to internal and external stakeholders.
- Mapped recurring administrative processes and introduced agenda, approval, and **follow-up** templates for consistent support.
- Coordinated calendars across underwriting, claims, risk, finance, and **international business** priorities.

STRENGTHS

- 🔍 **Executive judgment**
When priorities collide, creates a clear path forward and protects sensitive decisions with calm, discreet follow-through.
- 📅 **Calendar control**
Rebuilt scheduling routines around preparation checkpoints, giving leaders better visibility and fewer avoidable conflicts.
- ♥ **Briefing preparation**
Turns scattered research into concise meeting materials; quiet preparation helps executives enter important conversations ready.
- 👥 **Stakeholder care**
Handles customers, officials, and NGO representatives with polished communication, so sensitive matters reach the right owner.
- ⚙️ **Process improvement**
Introduces practical templates and shared workflows that make administrative support more consistent across leadership teams.

SKILLS

Calendar management

CEO support Microsoft Office

Word Excel PowerPoint Outlook

Copilot Travel planning

Expense reports

Meeting preparation

Executive briefings

Confidential information

Research and analysis

Process improvement

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



● Senior Executive Assistant to the Chief Executive Officer at Northstar Risk Partners (4.8 Years)

● Executive Assistant, Office of the President at HarborPoint Mutual Insurance (2.8 Years)

● Executive Assistant at Meridian Specialty Underwriters (1.4 Years)

● Administrative Coordinator at Clearwater Financial Services (1 Years)

Executive Assistant

Meridian Specialty Underwriters 📅 July 2017 - December 2018 📍 Naperville, IL

Supported chief operating officer and business unit leaders in specialty insurance, balancing client, staffing, government, and operational priorities. Managed executive communications, travel, **research**, quarterly meetings, and document-control improvements across four offices.

- Protected executive preparation time in Outlook amid changing client, staffing, and operational priorities.
- Arranged conference travel, accommodations, registrations, ground **logistics**, and accurate expense documentation for leaders.
- Gathered policy, market, and operational research for **Excel** analysis and **PowerPoint** leadership summaries.
- Coordinated quarterly leadership meetings across four offices with advance materials and action logs.
- Partnered with **administrative** peers on corrective procedures after identifying recurring scheduling and document-control issues.
- Maintained executive communications for customer and **government**-facing engagements with clear, measured follow-through.

Administrative Coordinator

Clearwater Financial Services 📅 June 2016 - June 2017 📍 Rosemont, IL

Coordinated administrative operations for a six-member financial services leadership group. Built early expertise in calendars, meeting planning, confidential records, expense reporting, travel research, vendor coordination, and executive materials while supporting risk, customer service, and business development teams.

- Resolved Outlook **scheduling** conflicts involving client appointments, internal reviews, and compliance deadlines.
- Compiled Excel **expense reports** and checked receipts, coding, and approvals before finance submission.
- Produced **Word** agendas, PowerPoint presentations, and **follow-up** notes for operational leadership meetings.
- Researched vendors, travel options, and meeting logistics for cost-aware regional events.
- Organized confidential records and meeting materials, earning expanded scheduling and stakeholder-contact responsibilities.
- Prepared meeting rooms and coordinated **administrative** details for financial services leadership operations.

PROJECTS

Executive Scheduling Workflow 📅 2022

Reworked calendar coordination with Outlook, Copilot, priority codes, preparation checkpoints, and weekly visibility reviews, giving CEO support a steadier cadence.

Leadership Travel and Briefing Program 📅 2020

Created repeatable travel and briefing practices for multi-city leadership visits, linking logistics, research, materials, expenses, and follow-up in one clear process.

LEADERSHIP & AWARDS

- Leadership Excellence Recognition, Northstar Risk Partners — 2024
- President's Office Service Award, HarborPoint Mutual Insurance — 2020
- Dean's List, Loyola University Chicago — 2013-2015

EDUCATION

Bachelor of Arts in Business Administration

Loyola University Chicago 🎓 GPA: 3.8 📅 2015 📍 Chicago, IL

Coursework: *Organizational Management, Business Analysis, Insurance Operations, Executive Communication*

CERTIFICATIONS

- Microsoft Office Specialist: Microsoft 365 Apps 📅 2023
- Microsoft Learn: Copilot for Microsoft 365 Fundamentals 📅 2024

TECHNICAL SKILLS

- **Microsoft Office:** Word, Excel, PowerPoint
- **Microsoft Productivity:** Outlook, Copilot, Microsoft 365
- **Calendar Systems:** Complex calendars, priority codes, schedule reviews
- **Travel Operations:** Itineraries, accommodations, ground transportation
- **Expense Administration:** Expense reports, receipt review, approval tracking
- **Executive Materials:** Briefing books, meeting summaries, action trackers
- **Business Analysis:** Research, Excel analysis, PowerPoint synthesis
- **Insurance Operations:** Underwriting, claims, risk management
- **Stakeholder Engagement:** Customer executives, government officials, NGO representatives
- **Administrative Processes:** Agendas, approvals, follow-up templates
- **Recruiting Support:** Recruiting materials, online recruiting, staffing agencies
- **Office Coordination:** Chicago offices, Oak Brook office, multi-office meetings

PROFESSIONAL AFFILIATIONS

- Executive Support Community Steering Committee, Northstar Risk Partners — 2023-Present
- Administrative Professionals Network, Chicago Chapter — 2018-Present
- Loyola University Chicago Business Student Mentor — 2014-2015

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST