

# SARAH RICHENS

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## Professional Summary

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Over 20 years of administrative experience with 11 years of experience leading the administration of a growing private equity firm ▪ Exceptional customer service ▪ Expertise in fund administration, investor relations, deal tracking, and data management ▪ Strong ability to multi-task, prioritize, and organize processes and operations ▪ Creative problem solving ▪ Strong attention to detail ▪ Able to work independently and deliver high-quality work ▪ Excellent written and oral communication skills

## Skills

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|-----------------------------------|-------------------------------------|
| • Data collection                 | • Coordination                      |
| • Quality assurance               | • Analytical thinking               |
| • Teamwork                        | • Research                          |
| • Organization                    | • Customer service                  |
| • Process improvements            | • Logistics and schedule management |
| • Interpersonal communication     | • Data entry and management         |
| • QuickBooks                      | • Administrative oversight          |
| • Accounts payable and receivable | • Microsoft Office                  |
| • Operations management           | • Audit support                     |
| • Data management                 | • Bank reconciliation               |
| • General ledger accounting       | • Maintain systems                  |

## Experience

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*Staff Accountant and Office Manager*

*Nov 2021 - Sep 2022*

*Spell Capital - Minneapolis, MN*

- Provide accounting support
- Manage all investor communications
- Act as custodian of corporate documents and records
- Serve as primary contact to building manager and other office vendors
- Coordinate and manage meetings logistics
- Executive support and duties as needed

*Bookkeeper and Executive Assistant (Part-time)*

*Oct 2019 - Aug 2020*

*Haiti Outreach - Minneapolis, MN*

- Assisted Executive Director with monthly financial reporting, reconciliations, and the annual audit
- Kept accurate books in QuickBooks on all financial transactions, including accounts payable and receivable and donation income

- Maintained donor CRM, recording and reconciling with Quickbooks all donation income and accounts receivables, keeping records of all donor relationships and correspondence, and reporting on donor information as needed
- Coordinated with Haiti office on purchasing, communicating closely with purchasing manager in Haiti and with vendors
- Managed administrative needs of Minnesota office, including arranging travel for groups and staff
- Provided support to Marketing Director, helping to coordinate fundraising events, and assisting in the creation of newsletters, annual report, and other written reports and mailings

*Executive Assistant*

*Jul 2017 - May 2018*

*National Grid Renewables - Minneapolis, MN*

- Provided administrative support to the company's CEO and the investment manager, including heavy calendar management, travel arrangements, data entry, contact management, word processing, filing, and organizing, and expense reporting
- Handled various personal tasks for the CEO and investment manager, including paying bills, arranging travel, running errands, and managing household activities
- Coordinated conference experience for company attendees, including travel arrangements, complex meeting schedules, and meeting room setup and catering

*Executive Assistant*

*Feb 2017 - Jul 2017*

*Castlelake - Minneapolis, MN*

- Provided administrative services in a fast-paced environment for a Partner and General Counsel of the firm, the Chief Administrative Office, and the Global Human Resources Director, as well as other assigned staff, including calendar management, travel, meeting set up, lunch arrangements, expense reporting
- Assisted with new hire onboarding (updating organization charts and directories, scheduling headshots, new hire orientation logistic planning)
- Assisted with scheduling interviews and overseeing interview schedule

*Executive Assistant*

*Apr 2016 - Jul 2016*

*Northern Pacific Group - Wayzata, MN*

- Provided the firm's executives (three partners and one vice president) a high level of customer service and administrative support in a position with heavy calendar scheduling and travel (at least 50 percent of the job)
- Headed up special project to update, correct and organize the fund administration information, legal documents and processes in the office
- Assisted Vice President with investor correspondence, marketing materials, investor presentations, wire transfers and other bank account management, managing databases, maintaining website
- Performed general clerical/office manager duties, including word processing, expense reporting, ordering supplies, maintaining office equipment, dealing with IT issues, answering phones, greeting guests

## *Administrative Director*

*Mar 2005 - Mar 2016*

*Stone Arch Capital - Minneapolis, MN*

Responsible for the administration of the business across three funds totaling over \$450M

### *Office Management*

- Managed small office, providing meeting support, assisting with IT issues, coordinating IT services, administering phone and security systems, answering phones, greeting guests, copying, faxing, and managing office supplies
- Oversaw and executed special projects, including office relocation; final construction of new office, as well as two additional office build outs; migration to a new Outlook enterprise server; thorough research for new phone system, security system, internet/phone service providers, and new IT services company; and the purchase of large office equipment
- Created and maintained extensive system and process documentation
- Supervised and developed administrative assistant staff

### *Fund Administration*

- Acted as business interface for investor relations for all correspondence and reporting, investor data management, investor facing web content, managing and troubleshooting investor requests, and organizing the annual meeting for all funds, including preparing updates and presentations
- Handled investor subscription process during fundraising, as well as any legal transactions during the investment period (transfer agreements, name changes, etc.)
- Assisted the CFO to deliver regulatory disclosures and compliance reporting

### *Executive Support*

- Provided executive level support to the four partners, including managing calendars, arranging travel, fielding calls and emails, typing correspondence, assisting with network development activity such as external board and committee participation, and providing personal assistant support as needed
- Maintained confidential information, including details on prospective deals, personal and financial information for all employees, the partners, and investors
- Assisted CFO and Controller with light accounting duties, acting as account contact to various vendors and dealing with invoice related issues, compiling expense reports, entering bills and expense reports into QuickBooks, and printing and mailing checks
- Worked with Vice President in charge of marketing, keeping track of all deal sources and updating database, preparing marketing presentations and other materials and updating website information

## **Education**

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*Bachelor of Music, Vocal Performance*

*May 2002*

*University of Northwestern - St. Paul, MN*