

## PERSONAL ASSISTANT

# Lauren Gresham

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Personal assistant with four years of experience supporting senior leaders in property and financial services. Currently PA to the founding partner of a commercial property firm, managing his diary, travel, client relationships, and a fair amount of personal admin too. I'm the kind of PA who reads the brief before being asked and has the backup plan already sorted.

## EXPERIENCE

Aug 2022 – Present

**Personal Assistant to Founding Partner**, Lismore Real Estate Advisors, Glasgow  
Sole PA to the founding partner of a boutique commercial property advisory firm.

- Manage a diary with **30-40 meetings per week** across clients, investors, agents, and solicitors
- Coordinate travel for **monthly London trips** and quarterly overseas travel to Dublin and Amsterdam
- Prepare and format **investment memos, pitch decks, and client presentations** — typically 3-4 per week
- Handle personal admin including **household scheduling, vehicle servicing, and private medical appointments**

Jan 2021 – Jul 2022

**Team PA – Wealth Management**, Brewin Dolphin, Glasgow  
PA to a team of 6 investment managers at the Glasgow office of a major UK wealth management firm.

- Managed diaries and client meeting schedules for **6 investment managers** with a combined AUM of £380 million
- Prepared **quarterly client valuation packs** — printed, bound, and posted to 200+ private clients
- Organised the annual client seminar at the Grand Central Hotel — **85 attendees, £7,000 budget**

Feb 2020 – Dec 2020

**Receptionist & Admin Support**, Burness Paull LLP, Glasgow  
Reception and admin support at one of Scotland's leading commercial law firms.

- Managed front desk for **350+ staff and 30+ daily visitors**
- Provided ad-hoc PA cover for **3 equity partners** during their regular PA's absences

## EDUCATION

Sep 2018 – Jun 2020

**HND in Administration and Information Technology**, Glasgow Clyde College, Glasgow  
Graduated with A in Graded Unit. Completed units in office management, business communication, and advanced spreadsheets.

## SKILLS

Diary & Schedule Management • Travel Coordination (Domestic & International) • Microsoft 365 (Outlook, Word, Excel, PowerPoint) • Document Formatting & Presentation Design • Client & Stakeholder Liaison • Expense Management & Reconciliation • Confidential Information Handling • Event Planning • Typing (78 wpm) • CRM Systems (Salesforce)

## CERTIFICATIONS

Sep 2021

**Microsoft Office Specialist – PowerPoint Associate**, Microsoft

Mar 2021 – Dec 2021

**Level 3 Diploma in Business Administration**, City & Guilds

## LANGUAGES

English (native)

## PROJECTS

Jan 2023 – Apr 2023

**Investor Reporting Templates – Lismore Real Estate**  
Created a standardised set of templates for investor updates and property acquisition memos.

- Designed **4 PowerPoint templates** with consistent branding for different document types
- Reduced partner's formatting time from **2 hours to 30 minutes** per document
- Templates now used across **all 3 partners** in the firm

Sep 2021 – Nov 2021

**Annual Client Seminar – Brewin Dolphin Glasgow**  
Organised the Glasgow office's annual client investment seminar from scratch.

- Managed venue booking, catering, AV, and invitations for **85 private clients**
- Stayed within the **£7,000 budget** — came in £400 under

## REFERENCES

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**Alistair Dunlop** Founding Partner, Lismore Real Estate Advisors, alistair.dunlop@lismorereal.co.uk, +44 7700 900 683  
**Fiona Campbell** Office Manager, Brewin Dolphin, fiona.campbell@brewin.co.uk, +44 7700 900 327

## EXTRA CURRICULAR ACTIVITY

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*Jun 2021* **Volunteer Admin – Glasgow City Mission**  
Help with admin and data entry at the charity's city centre drop-in. Volunteer one evening per week during winter months.

*Mar 2022* **Member – Glasgow PA Network**  
Quarterly meetups for PAs and EAs in Glasgow's financial and legal sectors. Group of about 25 regulars.