

Charlotte Reeve

EXECUTIVE ASSISTANT TO CEO

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11

BOARD MEETINGS A YEAR,
EIGHT DIRECTORS

£140,000

EVENTS AND TRAVEL
BUDGET HELD

60%

OF INBOUND RESOLVED
WITHOUT ESCALATION

Profile

I am executive assistant to the CEO of a 400-person fintech, through its Series B and C raises, holding the diary, inbox and board cycle across London and New York. I decide what reaches the CEO and what does not, approve spend to £5,000 on my own authority and act in the CEO's name when they are unreachable. Every role I have held ran better when I left it than when I arrived.

Key achievements

- 01 Rebuilt the board pack process after two late distributions, cutting preparation from nine days to four across 11 meetings a year and eight directors.
- 02 Renegotiated the firm's travel management contract, saving £38,000 a year on roughly 200 trips while improving out-of-hours support.
- 03 Designed the onboarding programme for executive hires from nothing, now used for every director joining the firm, with a 30-day plan owned by me.
- 04 Ran the 300-guest annual investor dinner for three years on a £90,000 budget, delivered under budget each year with a waiting list by the third.
- 05 Held the CEO's calendar through the Series C raise, protecting two strategic focus days a week and resolving 60% of inbound requests without escalation.

Awards

- 2023, UK Executive Support Awards, EA of the Year shortlist
- 2019, Halstead Capital Outstanding Contribution award

Experience

Executive Assistant to CEO

MARCH 2021 TO PRESENT

MERIDIAN PAY

A 400-person payments fintech headquartered in London with offices in New York and Lisbon, backed by Series C investors.

Sole support to the CEO across UK and US time zones, and the first point of contact for the board, the firm's 12 largest investors and the leadership team. Trusted to decline meetings in the CEO's name and to approve spend to £5,000 without sign-off.

- Manage a diary of 30 to 40 meetings a week across three time zones, holding authority to decline and reprioritise without sign-off
- Run an inbox of roughly 300 messages a day to a same-day standard, resolving the majority without escalation
- Own the full board cycle for 11 meetings a year: agendas, packs for eight directors, minutes and follow-up actions tracked to completion
- Hold the £140,000 events and travel budget and approve spend to £5,000 on my own authority
- Coordinate roughly 200 trips a year across UK, US and European offices, including a US roadshow rebuilt overnight after a cancelled flight
- Line-manage the office coordinator and train each new team assistant, three in four years
- Handle privileged and confidential matters daily, including the Series B and C data rooms

Executive Assistant to Managing Partner

JUNE 2017 TO FEBRUARY 2021

HALSTEAD CAPITAL

Supported the managing partner of a 40-partner private equity firm, moving to Meridian Pay when the founder asked me to build the CEO's office from scratch.

- Ran due diligence logistics through an 18-month fund raise, coordinating 14 advisers across two firms.
- Managed the partnership's quarterly meeting cycle, papers for 40 partners and 120 actions a year tracked to completion.
- Handled privileged and confidential client matters daily, trusted with material no one else in the support team saw.

Team Assistant

2015 TO 2017

HALSTEAD CAPITAL

Supported two directors and the deal team before being promoted to the managing partner's office.

- Built the team's first shared travel and expenses process, adopted across the firm.
- Coordinated logistics for six investor roadshows a year across four cities.

Professional development

- Minute-taking for boards, ICSA, 2022, after which I moved the firm to action-led minutes distributed within 24 hours
- Founding member of the firm's assistant community, mentoring three team assistants a year

Systems

Concur, Diligent Boards, Navan, Salesforce, Microsoft 365, Google Workspace, Zoom, Teams.
Conversational French.

Skills

Diary and inbox: 30 to 40 meetings a week across three time zones, declined and moved in the CEO's name
Board support: the full cycle for 11 meetings a year, packs for eight directors
Budget and spend: £140,000 held, approving to £5,000 on my own authority
Investor and board contact: first point of contact for the board and the 12 largest investors

Education

BA History, University of Manchester, 2011 to 2014

Interests

Completed the Yorkshire Three Peaks in 2024, and school governor at a Manchester primary since 2022.