

THERESA RIVAS, CAP, CWCA, MOS, NOTARY

VP, Chief Executive Assistant | Board & Governance Liaison | Strategic Partner to the CEO

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PROFESSIONAL SUMMARY

Certified administrative professional with 12+ years of progressive experience supporting C-suite executives and Boards of Directors in dynamic, regulated environments. Currently serving as VP, Chief Executive Assistant at Beneficial State Bank, a critical member of the executive team, Board liaison, and leader of the administrative support function. Recognized as an early adopter of emerging technology (including AI/Copilot), a trusted strategic sounding board to the CEO, and a calm, solutions-driven force multiplier. Uniquely grounded in financial operations through 12+ years of small business bookkeeping experience, bringing rare business acumen and budget oversight to executive support.

CORE COMPETENCIES

CEO & C-Suite Support	Board & Governance Liaison	Stakeholder Relations	Team Leadership & Mentoring
Strategic Planning Partner	Complex Event & Travel Mgmt	Technology Early Adoption	Confidentiality & Discretion
Executive Calendar Management	Cross-Functional Collaboration	Corporate Communications	Process Improvement

TECHNOLOGY PROFICIENCY

Microsoft 365: Teams, Outlook, Word, PowerPoint, SharePoint, OneNote, Teams Planner

Microsoft Copilot (AI): Enterprise champion & early adopter

Concur: Travel & expense management

Process Automation: Workflow design & optimization

NOTABLE ACHIEVEMENTS & IMPACT

- **Promoted to VP, Chief Executive Assistant** after demonstrating exemplary performance as Sr. EA to the CEO; created and assumed leadership of the bank's full Administrative Support team.
- **Championed and implemented Microsoft Copilot** across the organization, driving AI adoption that increased efficiency in note-taking, scheduling, drafting, and cross-functional communication.
- **Led Core Conversion project logistics** across multiple cities (Oakland & Portland), coordinating multi-vendor communication, hotel negotiations, meal logistics, and employee engagement across IT, HR, and executive leadership.
- **Served as primary Board & Governance Liaison** managing all Board and Committee meeting logistics, materials, agendas, and minutes; earned written recognition from a Board Director for bringing calm, professional leadership behind the scenes.
- **Standardized corporate policy templates** by reformatting the Legal/Compliance department's policy template, which was adopted organization-wide, improving committee and board review efficiency.
- **Elevated CEO communications effectiveness** by partnering with the Impact Communications Marketing team to develop and deliver organization-wide messaging aligned to the CEO's voice and strategic goals.
- **Drove significant year-over-year operational cost reductions** through calendar optimization, inbox management, and elimination of redundant executive office workflows.
- **Singlehandedly produced a two-day Board of Directors Learning Journey** in 2025 encompassing a 75+ person all-staff happy hour, a client and branch bus tour, a multi-day strategy session, hotel room blocks, full catering and travel logistics, and custom curated gift bags, with zero support staff.

- **Designed and executed three cross-organizational Business Summits in 2025**, serving as sole planner, coordinator, and executive partner; convening key business lines for strategic alignment, operational effectiveness reviews, and mission-driven planning; ensured consistent summit design, seamless execution, and structured follow-through across all sessions.
- **Managed and mentored teams of Executive Assistants**, establishing training platforms that improved productivity, cross-departmental collaboration, and client experience across the organization.

PROFESSIONAL EXPERIENCE

VP, Chief Executive Assistant

Beneficial State Bank — Portland, OR | *Sept 2024 – Present*

- Serve as strategic partner and sounding board to the CEO.
- Act as primary liaison between the CEO, Executive Leadership Team, and Board of Directors — attending Board and Committee meetings, preparing governance materials, and transcribing and disseminating minutes.
- Lead, manage, and develop the bank's Administrative Support team; oversee performance conversations, mentoring, and skill development for direct reports.
- Spearheaded enterprise-wide Microsoft Copilot adoption, serving as early adopter, champion, and trainer to drive AI-enabled efficiency across the organization.
- Draft and edit confidential correspondence, executive communications, reports, presentations, and Board materials independently and on behalf of the CEO.
- Coordinate complex domestic travel, speaking engagements, conferences, and executive strategy offsites for the CEO and extended C-suite team.
- Initiate and continuously improve administrative procedures and workflows for Executive Management and Board activities.

Sr. Executive Assistant to the CEO

Beneficial State Bank — Portland, OR | *Sept 2022 – Sept 2024*

- Managed the CEO's extremely active calendar, proactively anticipating conflicts and ensuring alignment with organizational priorities and stakeholder commitments.
- Coordinated Board and Committee meeting logistics, agendas, and materials; provided on-site meeting support and post-meeting follow-through.
- Led transition of All Hands Meeting coordination, agenda development, logistics, and facilitation, increasing staff engagement and communication effectiveness.
- Supported cross-functional projects for Legal/Compliance, IT, HR, Finance, and Communications, streamlining operational processes and improving organizational efficiency.
- Acted as a trusted gatekeeper and liaison between the CEO and internal and external stakeholders, ensuring requests were vetted and routed with appropriate urgency.

Executive Assistant to CEO

Confidential — Pacific Northwest | *Apr 2022 – Jun 2022*

- Provided executive-level operational and calendar support during a critical organizational transition, enhancing operational efficiency and stakeholder communications.

Executive Assistant to EVP

Umpqua Bank — Portland, OR | *Feb 2020 – Apr 2022*

- Supported SVP of Core Bank Strategy and EVP of Community Business Banking, directly aligning executive priorities with organizational strategic goals.
- Enhanced operational workflows in a fast-paced banking environment, ensuring timely execution of strategic initiatives and leadership team commitments.
- Cultivated strong cross-functional stakeholder relationships to promote a collaborative work culture and ensure executive office effectiveness.

- Managed complex calendars, domestic travel, executive communications, and high-volume competing priorities with professionalism and discretion.

Executive Assistant to EVP

Fremont Bank | Dec 2012 – Dec 2019

- Strategic partner to EVP of Community Banking; represented the department to internal and external constituents and supported the CEO in board committee coordination.
- Coordinated schedule and communication across the leadership team; organized tasks and projects to meet timeline requirements.
- Partnered with Special Events on planning and execution of client-facing and leadership planning events.
- Managed and mentored a team of nine Executive Assistants, establishing a training and skill-building platform resulting in increased productivity and cross-departmental collaboration.

CERTIFICATIONS

CAP — Certified Administrative Professional

*International Association of Administrative Professionals; IAAP (2017 - recertified in 2025)
Additional Certs: OM, HR, PM, RM*

Oregon Notary Public Commission

*State of Oregon - Commission #1035398
Valid Apr 2023–2027*

CWCA — Certified World Class Assistant

Office Dynamics International (2019)

MOS — Microsoft Office Specialist

Microsoft Corporation (2019 & M365)

Ongoing Professional Development: AI technology, executive leadership, records management, human resources, project management, Board Governance, EA cohort quarterly meetings, co-host EA networking group

EARLIER CAREER — FINANCIAL OPERATIONS

Owner & Sole Proprietor

By The Books - Small Business Bookkeeping & Tax Services | Sept 2001 – Apr 2014

Operated an independent bookkeeping and tax services firm serving multiple small business clients simultaneously. Managed full-cycle bookkeeping, financial reporting, payroll, and tax preparation. This experience has built the foundational financial acumen that directly informs budget oversight, expense management, and operational cost analysis in executive support roles today.

PROFESSIONAL AFFILIATIONS & COMMUNITY

Vice President & Advisory Board Member — The Admin Awards (Apr 2021 – Dec 2023)

CliftonStrengths: Developer | Positivity | Relator | Arranger | Responsibility

Community: Junior Achievement volunteer (Portland); Culture ERG contributor; EA mentoring & networking community leader.