



Job Title: Operations Manager

Summary/Objective

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The Operations Manager will oversee the firm's back-office technology, client reporting process, system integrations and client experience. Focused on streamlining and improving advisor operations, this role is responsible for the day-to-day management of all business operations and client service platforms. This position will maintain an intimate knowledge of technology applications and system integrations, and how they improve workflow efficiency. Ideally, this person will possess a passion for understanding cutting-edge technology solutions, sharing their knowledge with others and driving change management throughout the organization. The Operations Manager will look for ways to create efficiencies and provide ongoing support and training to ensure the highest level of adoption and efficiency. They will be expected to create and implement policies and procedures around transaction processing and advisory operations, and be able to translate them to advisors effectively.

Essential Functions

- Oversee all day-to-day operational activities that support the advisor's ability to deliver a fantastic client experience
- Ensure all transaction processing follows internal procedures and compliance regulations
- Maintain the complete technology stack, taking ownership and understanding of all tools and their various functions
- Implement new technology solutions to improve efficiency throughout the organization
- Provide ongoing support, supervision, training and development opportunities for team members, offering guidance and informing best practices to build comfort with the tools
- Develop and maintain written standard operating procedures, how-to documents and workflow diagrams
- Create internal and client-facing report packages, using portfolio accounting reports with data research from industry platforms
- Monitor and oversee third-party vendor performance as it relates to daily operations
- Ensure complete, accurate and timely delivery of management reports to key stakeholders
- Manage relationships with external vendors and technology providers
- Establish and report on Key Performance Indicators to track and manage success

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Position Type/Expected Hours of Work

This is a full-time position. Workdays and hours are Monday through Friday, 8 hours a day, 40 hours per week.

Required Education and Experience

- Expert-level understanding of Investment Operations, Portfolio Accounting, and Performance Reporting
- Familiarity with transaction processing as it pertains to mutual funds, ETFs and fixed-income instruments
- General solid IT infrastructure knowledge
- College degree preferred or relevant work experience required

Preferred Skills and Qualifications

- Experience with

- Familiarity with

- Ability to communicate internally with

- Experience with

Competencies

- Ability to work well in a fast-paced team environment
- Ability to manage multiple tasks and prioritize based on business needs
- Proficiency in navigating various technology tools
- Proven ability to manage staff development and performance