

Position Description

Title: Operations & Marketing Associate

Reports to: Client Services Manager & Director of Operations

Benefits: Medical, Dental, Vision, Life, FSA, 401(k), Paid-Time Off, Paid Holidays

Job Summary

The Operations and Marketing Associate will assist the Back Office department with various administrative tasks, onboardings, and procedures. The candidate will also work closely with other Client Services Associates and advisors to ensure all work is thoroughly completed with minimal errors. Additionally, this individual will learn how to build websites, business cards, brochures, and other various marketing materials/campaigns. They will also be helping with a variety of marketing projects. This position will use a variety of computer programs including Salentica/Salesforce CRM, Microsoft Office, Wix, Canva, MeisterNote, and custodian platforms.

Duties and Responsibilities

The Operations and Marketing Associate can expect to focus in the following areas:

- Assists Back Office department with various tasks.
- Prepare and track account opening and transfer documents.
- Track and submit wires, ACH, check requests, etc.
- Prefilling documents and completing DocuSigns.
- Paperwork processing and follow-up.
- Renaming, filing, and processing paperwork daily
- Escalate issues or complex tasks to appropriate personnel
- Assist with onboarding new advisors and clients.
- Maintain all client and advisor files in orderly manner.
- Answer telephone calls.
- Follow operational procedures.
- Building websites on Wix.
- Designing marketing materials/campaigns and working on marketing projects.

Requirements and Qualifications

- Bachelor's degree from an accredited college or university
- Investment management industry experience preferred, particularly in an advisor support role
- Securities Industry Exam, required 6 months following date of hire
- Prior design experience preferred but not required
- Solid strategic thinker and problem solver
- Strong organizational and project coordination skills with the ability and experience to handle and prioritize multiple assignments and conflicting deadlines, while providing a high level of client service
- Ability to work effectively under pressure with tight deadlines, with attention to detail, and the ability to handle conflict and negotiate resolution
- Ability to be responsible for confidential and time sensitive material
- Proficiency with windows-based software (e.g. Word, Excel, and PowerPoint) and Outlook is required
- Excellent written and verbal communication skills – clear, concise, and organized
- Ability to work in a team-based environment, proactively covering and sharing task responsibilities with other team members
- Be self-motivated, show initiative and creativity in all aspects of work (e.g. creating new methods to streamline tasks)
- Work independently with little supervision and knows when to ask for guidance, clarification, assistance
- Possess a high level of professionalism, confidentiality, discretion, and judgment
- Team player, with strong coaching and listening skills
- Desire/ability to work successfully in a small company environment