Job Description:

Operations Associate

The responsibilities for the Operations Associate position are related to successful client relationship management and data maintenance, generating and processing of investment account paperwork, and administrative tasks to support the financial advising team.

Vision: Life Confidently Enjoyed
Mission: Guiding the Journey to True Wealth.
Values: W.E.A.L.T.H.: Wisdom, Enterprise, Administration, Life, Truth, Honor

Key Competencies:

- Service minded and extremely detail focused
- Driven to enhance and deepen the client relationship experience
- Excellent organizational, multi-tasking and time management skills
- Proficiency with Salesforce CRM and Microsoft Office tools
- Previous operational experience in the financial services industry is preferred but not required
- GSD (get stuff done) is in your DNA
- Willingness to step up to assist team members and the evolving needs of the organization
- Warm, inviting and approachable demeanor

Responsibilities:

- Provides a service-minded approach to the management of all prospective and existing client relationships.
- Manages and coordinates client questions and concerns to workable solutions.
- Manages all procedures and follow-up necessary to service client needs (e.g., preparing and processing account related paperwork, client data input and management, and generating various investment reports as needed).
- Initiate and maintain outstanding client relationship touchpoints through random acts of kindness, thank you notes and on-going communication.
- Coordinate advisor team and client relationship meeting schedules.
- Prepares or generates requested reports and spreadsheets in a timely manner.
- Provides general technical support to customers regarding online user portals and dashboards.
- Provides seamless service to new or existing relationships by demonstrating a comprehensive understanding of customer needs and emphasizing timely responses.
- Assists with advisor meetings, records meeting notes and follows up on action items.
- Collaborates with team members to ensure all materials and financial plans are prepared in advance of scheduled meetings.
- Prepares follow-up communication for client relationships while demonstrating outstanding professionalism and service-minded messaging.
- Performs other duties as requested.

Compensation: The Operation Associate is a salaried position with the potential for growth in efficiencies and overall profitability of organization. The growth is correlated to the stakeholder's key performance indicators and ability to nurture relationship direct individual or existing multi-generational referrals because of their own personal relationship experience.

For interested applicants, please send your resume to info@pinnaclewealth.com