

## **Operations Associate – Operations Solutions and Executive Administration**

Location: Edenton, NC or Work from home – full time

AllBackoffice Consulting: Leading financial adviser solutions & enterprise financial technology solutions provider. AllBackoffice Consulting helps independent RIAs to start their practices and to execute better in their operations, administration, and technology. Our experienced team and diverse network of partners work together to provide an open technology and vendor platform, tailored for each RIA practice.

Values:

- Honesty
  - Honesty is always a choice. We are honest with ourselves, our team, our clients.
- Dependability
  - We are dedicated and committed to doing what we say we will do
- Above and Beyond
  - We do what it takes to deliver...to find a solution
- Adaptability/Flexibility
  - We are proactive learners – Have the patience and the wisdom to change
- Fast and Accurate
  - We are working smarter and faster, a choice
- Proactive Frequent Communication
  - We communicate under our own initiative and with consistency

The ideal candidate will be committed to confidentiality of client data and will be responsible for delivery and execution of executive administration, operations and technology services. This candidate cares about the clients we serve on a personal level and enjoys solving problems. This candidate builds relationships with everyone around them and focuses on client's stated and unstated wins. Experience, intellect and care, drive a focus on understanding, and resolving problems.

Responsibilities:

- Responsible for quality and timely execution of services to advisors
- Proactive and frequent communication, with commitment to standard operating procedures and documented workflows in advisory software tools
- Proactively manage to avoid errors and delivery short-falls
- Utilize multiple software platform for across the advisory operation.
- Coordinate with custodian/internal teams to resolve daily and one-off issues
- Manage best practice processes to include quality assurance, billing, and performance reporting cycles for clients
- Provide services in compliance with advisory policies and procedures
- Work with internal team to develop more efficient processes and consistent best practice policies

- Remain proactive and responsive to management, team, and clients by phone and email for the good of the company
- Analyze client needs to provide solutions based on client goals
- Prepare materials for advisor-client meetings
- Complete, coordinate with client, submit and manage exceptions for client required paperwork

#### Qualifications:

- Knowledge of office procedures and of spelling, grammar, punctuation, and arithmetic
- Experience preferred with remote desktop. Microsoft office, and web-based work knowledge
- Skill needed in data entry, managing time, attention to detail
- Comfortable working independently as well as in groups
- Can demonstrate that they have intellectual curiosity in solving problems
- Is a fast learner
- Good written and verbal communication, and a good listener
- Ability to handle difficult and stressful situations with professional composure
- Ability to maintain effective interpersonal relationships
- The ability to manage multiple request while meeting deadlines
- Ability to process and handle confidential information with discretion
- Types over 60 words per minute

AllBackoffice Consulting is committed to supporting the advisors we work with as an open architecture operations workflow and strategic support partner. By joining our team in this role, you will have the opportunity to become a long-term trusted advisor for investment advisory practices.

Compensation will be determined depending on the candidate's experience. AllBackoffice also offers retirement plan matching, as well as health insurance and 3 weeks paid time off per year.