Account Manager – Operations Administration & Consulting for RIA Practices

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

AllBackoffice Consulting: Leading financial adviser solutions & enterprise financial technology solutions provider. AllBackoffice Consulting helps take ownership of operations work and technology while saving time for all members of the existing RIA team. Better tools, better workflows and better client experience all lead to referrals and growth. Our experienced team and diverse network of partners work together to support your practice with best fit technology to best practice workflows, all tailored for each RIA practice.

Who We Are

Our work is guided by Christian values of integrity, humility, service, and excellence. We are a faith-based company that believes in treating our team members, clients, and business partners with honesty, respect, compassion, and professionalism. While employees are not required to share our faith, we seek individuals who value working in a purpose-driven, values-based environment.

Division: Investment Advisory Solutions

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 experienced in the RIA operations and technology, 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 our client's stated and unstated wins. Experience, intellect and care, align so this individual can be an operations copilot to RIA advisors and their operations leaders. This individual is naturally organized, thrives in a fast-paced environment, and enjoys balancing multiple priorities without sacrificing quality. They take ownership, communicate proactively, and don't wait to be told what to do. They genuinely enjoy helping others succeed and take pride in delivering an exceptional client experience.

Responsibilities:

- Responsible for quality and timely execution of services to advisors
- Clarifying, confirming, documenting and ultimately, creating workflows in CRM for RIA specified recurring work
- Complete/ delegate, coordinate with client, submit and manage exceptions for client required paperwork.
- Prepare materials for advisor-client meetings
- Delegate or elevate tasks as assigned by advisors while being the main point of quality assurance for client work.
- Proactively manage to avoid errors and delivery short-falls
- Analyze client needs to provide solutions based on client goals
- Proactive and frequent communication, with commitment to standard operating procedures and documented workflows in advisory software tools
- Utilize multiple software platforms 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
- Coordinate with a team of operations peers and industry vendors to provide additional resources and solutions
- Manage RIA expectations in regards to costs and solutions delivery
- Serve as a trusted operations consultant to advisory firms by identifying workflow improvements and operational efficiencies
- Recommend best practices based on industry knowledge and AllBackoffice's operational standards
- Participate in client meetings to discuss operational initiatives, project updates, and technology solutions
- Assist advisors with strategic operational planning and implementation of new processes

Technology Experience

Preferred experience with:

- Schwab Advisor Center
- Fidelity Wealthscape
- Advyzon/Orion/Tamarac/Black Diamond
- Redtail/Salesforce/Salentica/Wealthscape
- DocuSign
- Zoom

Qualifications:

- Enjoy the challenge of working side by side with RIA professionals and appreciate the 1-5 advisor boutique work environment
- Loves working with good people just as much as the work itself

- Seek the benefits of working with multiple teams, providing best practice recommendations and serving RIA entrepreneurs with sincere passion
- 2+ years Prior experience working for an RIA
- Project management
- 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 intellectual curiosity in solving problems
- Is a fast learner and types over 60 words per minute
- 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 projects with meeting deadlines
- Ability to process and handle confidential information with discretion

What Makes Someone Successful in This Role

We're looking for someone who:

- Takes ownership and follows through without being asked.
- Has exceptional organizational and time management skills
- Demonstrates sound judgment and professionalism
- Thinks critically and enjoys solving complex problems
- Is resourceful and continuously looks for better ways to work
- Communicates proactively and effectively
- Has a high level of emotional intelligence and enjoys building relationships
- Is coachable and embraces feedback as an opportunity to grow
- Thrives in a collaborative, team-first environment
- Maintains a positive attitude, even when priorities shift

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.

Benefits

- Competitive compensation based on experience
- Health insurance
- Retirement plan with company matching
- Three weeks of paid time off
- Work-from-home flexibility
- Exposure to leading financial technology platforms
- Opportunity to work with some of the nation's most successful independent RIAs
- Collaborative, values-driven team culture

Why Join AllBackoffice?

We aren't simply an outsourced operations team. We become trusted partners to independent financial advisory firms across the country. Every day brings new opportunities to solve problems, improve businesses, and make a meaningful impact on the advisors and clients we serve.

If you enjoy variety, continuous learning, meaningful client relationships, and working alongside a collaborative team that genuinely cares about one another, you'll find a rewarding career at AllBackoffice.

This role is ideal for someone who enjoys solving complex problems, thrives on organization, takes ownership without being asked, and finds satisfaction in helping others succeed. If you're looking for a career where every day is different, your ideas are valued, and your work makes a meaningful impact on advisory firms and the clients they serve, we'd love to hear from you.