

OPERATIONS SYSTEMS ANALYST

We are looking for an Operations Systems Analyst. You will report to our Head of Operations Systems and support the firm's wealth management business. You will be responsible for data accuracy and analytics and will work regularly with senior management, advisors, and clients to help enhance the user experience and deliver new, creative operational tools and solutions. This position will be based in either Richmond, VA or Summit, NJ.

What You Will Do:

- Utilize the firm's primary operations systems, including Black Diamond and Salentica Elements (Salesforce based CRM)
- Ensure accuracy of data from custodian platforms into our internal systems.
- Ensure accurate and timely performance reporting on a monthly and quarterly basis.
- Understand the needs of system users in order to optimize system design and functionality.
- Train financial advisors and staff to maximize the value they receive from the operations systems.
- Create reports to meet the needs of advisors in managing their business.
- Use data analytics tools to create metrics and manage a business intelligence dashboard that provides firm leadership with key financial insights.
- Manage client, advisor, team, product, and custodian set-ups in the system for integrity of data and reporting.
- Manage data conversions and the data processes supporting new advisor team integrations.
- Seek ways to expand and leverage integrations and improve reporting and systems to gain efficiencies and insights.

Your Skillset Includes:

- Excellent Excel skills, including expertise working with large sets of data and utilizing tools such as pivot tables, VLOOKUP, and conditional formatting. Knowledge of APIs and more advanced data management & processing techniques a bonus.
- Familiarity with Black Diamond and other Advent technology platforms preferred.
- Knowledge and working history with multiple custodian platforms preferred.
- Highly proficient with Microsoft Office products, including Word, PowerPoint, and Excel.
- Understanding of financial industry rules and regulations and standard wealth management terminology and business models.
- CFP designation preferred.
- Willingness to obtain other licenses as needs arise.

The Following Describes You:

- Highly organized with the ability to work effectively on multiple projects concurrently with shifting priorities.
- Extremely detail-oriented with excellent analytical, conceptual, and problem-solving skills.
- Team-oriented colleague who believes in the power of collaboration with colleagues and external partners.
- Mindset of constant improvement, whether in operational efficiency or in delivering greater value to clients.

- Client-focused with a customer service mentality.
- Desire for professional growth in a start-up like environment.
- Ability and desire to take initiative and learn new systems and software tools.
- Positive attitude.

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability or veteran status.