

OPERATIONS ANALYST

We are looking for an Operations Analyst to join our growing team. You will report to our Deputy Chief Operating Officer and support the firm's wealth management business. You will be responsible for communicating with and training employees on the use of our operations systems and working with our 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.

Operations Analyst Responsibilities:

- Utilize and interact with the firm's primary operations systems, including Black Diamond Portfolio Reporting and Salentica Elements (Salesforce-based CRM).
- Train our financial advisors and staff to maximize the value of our technology resources.
- Manage the data transfer from custodian platforms into our internal systems.
- Ensure accurate and timely performance reporting on a monthly and quarterly basis.
- Understand the needs of firm users in order to optimize system design and functionality.
- 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.

Operations Analyst Requirements:

- Excellent Excel skills, including expertise working with large sets of data and utilizing tools such as pivot tables, VLOOKUP, and conditional formatting.
- Prior experience providing training and mentorship to employees.
- 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.

Operations Analyst Attributes:

- Highly organized with the ability to work effectively on multiple projects concurrently.
- Ability to work with other employees to develop policies and procedures that help manage workflow.
- Team-oriented colleague who believes in the power of collaboration with colleagues and external partners.
- Client-focused with a customer service-first mentality.
- Extremely detail-oriented with excellent analytical, conceptual, and problem-solving skills.
- Mindset of constant improvement in both operational efficiency and delivering greater value to clients.
- Ability and desire to take initiative and learn new systems and software tools.

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.