CARY STREET
PARTNERS

WEALTH MANAGEMENT SYSTEMS ANALYST

The Wealth Management Systems Analyst will report to the Head of Operations Systems and will be responsible for managing the company's wealth management systems specific to operations and client management. This individual will identify and implement solutions to best achieve technological and operational objectives, including leading projects designed to enhance current technology and capabilities for both internal users and end-clients.

Responsibilities

- Develop into a subject matter expert to help maximize the functionality and utilization of current wealth management systems, including Axys, Black Diamond, and Salentica.
- Provide daily account reconciliation and other analytical tasks required to maintain operational and client account accuracy.
- Work closely with the trading team to monitor trade execution and manage client account balances and strategy shifts.
- Collaborate with financial advisors and branch staff across the firm to understand specific systems needs and develop and implement creative solutions.
- Train financial advisors and branch staff to maximize the value they receive from the wealth management systems and drive increasing utilization rates.
- Seek ways to improve reporting and systems to gain additional efficiencies and insights.
- Collaborate with colleagues from IT, Compliance, and other departments to maximize functionality and ensure compliance with firm standards and industry regulations.
- Other projects, outside of regular scope of work, as assigned by the Head of Operations Systems.

Professional Experience

- 3+ years of relevant wealth management industry experience.
- Extensive experience working closely with top-tier wealth management systems, such as Axys, Black Diamond, Orion Advisor Technology, Addepar, Moxy, Salesforce, Salentica, RedTail, RiskAlyze, and other fintech solutions.
  - Specific expertise with either or both Advent Axys and/or Black Diamond strongly preferred.
  - Familiarity with performance calculations, composites, GIPS®, account sleeving, rebalancing, carve-outs, or CSSI CarveOut Utility a plus.
- Experience working with multiple client custodial platforms, including Schwab, TD Ameritrade, and/or Fidelity.
- Experience leading projects from ideation to completion.
- Series 7 and 66 (or equivalent) securities qualifications preferred, but not required.
- CFP® license holder or CFP® candidate preferred.
- Undergraduate degree in business, accounting, finance or related field or equivalent experience.

Personal Attributes

- Strong interest in the wealth management industry and, specifically, technology and systems supporting wealth management.
- Highly organized with strong attention to detail.
- Mindset of constant improvement, whether in operational efficiency or in delivering greater value to clients.
- Ability to work under pressure, exercise sound judgment in decision making, and adhere to strict deadlines.
- Ability to manage multiple tasks simultaneously with minimal supervision.
- Strong interpersonal skills and demonstrated ability to interact effectively with management, coworkers, and vendors.
- Customer service - first mentality with ability and desire to collaborate with others.
- Ability to learn new systems and software quickly.
- Naturally inquisitive with a strong desire to innovate and improve processes.
- Excellent analytical, conceptual, and problem-solving skills.
- Willingness to take on projects, outside of regular scope of work, as assigned by Head of Operations Systems.

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.