WILLIS JOHNSON & ASSOCIATES
STRATEGIC WEALTH MANAGERS

Client Operations Administrator

Reporting to the Lead Advisor, the Client Operations Administrator is responsible for operations service support, using strong administrative skills and attention to detail to serve as "mission control" to Wealth Management team members. This position offers opportunities for growth in either the client-facing Wealth Management track, or the non-client-facing Operations Administration track.

Essential Responsibilities

Client Service:

- Prepares and processes paperwork to open new investment accounts. Uses expertise to instruct advisors on best paperwork processes to establish clients' targeted accounts
- Responds to service requests and processes related services paperwork
- Performs status checks throughout transfer processes, communicating status with team members
- Ensures all submitted paperwork is fully completed, accurate, and "in good order"
- Serves as Custodian liaison by coordinating all related questions and actions
- Debriefs client cases with advisors and coordinates trade instructions to Investment Team
- Prepares client summaries for Investment Review Meetings
- Records all client service tasks and notes in CRM to ensure all actions are processed timely and accurately, ensuring all steps are taken appropriately
- Attends weekly Wealth Management CIM (Cases in Motion) Meeting

Investment Operations:

- Assists with trading platform and client account billing, serving as a critical back-up for these functions in the absence of Investment Operations Associate
- Prepares client Investment Review books in the absence of Intern
- Prepares money balance reports, performance reports and weekly/quarterly GIPS analysis as needed
- Assists Senior Financial Analyst by preparing various spreadsheets and reports for Investment Team Meetings
- Attends weekly Investments Team Meeting

Project Management:

- Coordinates the scope, timeline and resources for the successful implementation of key projects, including but not limited to firm-wide paperless initiative, development and documentation of firm's proprietary client and operational processes, etc.
- Regularly reviews, audits and refines current operational processes and systems

Qualifications

- Bachelor's degree, plus 1-3 years with client service, administrative or operations experience at an investment, financial planning, wealth management, banking or insurance firm
- Demonstrates excellent organizational, problem solving and communication skills in a highly-collaborative team environment
- Detail-oriented with strong prioritization and project management skills to drive progress of firm projects; ability to handle multiple projects and tasks simultaneously while maintaining quality work
- Strong technology skills, including MS Office (Excel), CRM and internal portal technology
- Highly adaptive and responsive to changing needs and deadlines
- Ability to establish structures, checks-and-balances, and maintain follow-up systems

To Apply- Because we are looking for an exceptional candidate to be the next member of our team, our entire advisory staff participates in the selection process. To apply, please email your resume and cover letter to jobs@wjohnsonassociates.com with your full name, followed by "Client Operations Administrator" in the subject line.