

Operations Administrator Job Description

Famiglia Wealth is a rapidly growing independent wealth management firm in Bloomfield Hills, MI, and is seeking an Operations Administrator for our expanding team. This is a great opportunity for friendly, optimistic, and detail-oriented candidate with minimum 2+ years of financial services experience to thrive in an operational administrative role.

Position Overview

This is a full-time, non-exempt position that will support a team-based approach to client service directly managing existing and new client relationships. Standard hours are 40 hours per week during normal business hours. From time to time, this position may require time outside of standard hours.

On a daily basis, you will handle requests from advisors and clients and effectively use your passion, our technology, and processes to provide a consistently exceptional client service. A strong candidate may grow in responsibility and contribute to operational leadership of the firm.

Initial Key Areas of Responsibility (but limited to):

- Cultivate and enhance new and existing client relationships through active communication with clients
- Responsible with the firms CRM, client data, tasks, account processing, tracking ACHs, transfers, contributions, distributions, etc.
- Provide administrative support including managing firm calendars, handling phone calls, and managing documents
- Responding to client and advisor service requests
- Review and take appropriate action on client account alerts
- Handle phone, email and written communication with clients in a professional manner
- Responsible for the firm's marketing, including digital and social media platforms

Key Qualifications:

- Detail-orientated with superior organizational skills and ability to prioritize tasks
- Team player with the ability to collaborate with others
- Minimum of 2+ years in financial services, preferably with RIA Custodian experience, preferably with Pershing and NetX 360/360+ (Schwab, Fidelity, or TD Ameritrade also helpful)
- Strong knowledge of Microsoft Office suite, specifically Word, Excel, Outlook, and PowerPoint
- Securities licenses helpful (not required)
- Two-year or four-year degree preferred but not required for strong candidate

Benefits:

- Competitive hourly compensation
- Company subsidized health, dental, vision and 401k plan
- Paid Time Off allowance

To apply, please submit a cover letter and resume to Robyn Crewdson at robyn@famigliawealth.net.