

**Job Description
Director of Operations
June 2019**

Opportunity Overview

Director of Operations is a new leadership position to support firm growth with areas of responsibility in operations, human resources, financial accounting, office management, technology, and compliance.

Key Responsibilities and Duties

- Manage work direction of others and personally contribute to completion of core operational functions including scheduling, potential client inquiries, and document management.
- Consistently execute client billing and payroll on time and with high accuracy.
- Manage custodial forms including follow-through to ensure processing and minimizing not-in-good-order errors and client inconvenience.
- Promote a positive team environment where everyone enjoys their work.
- Support team members in effectively completing their responsibilities.
- Design and implement new employee on-boarding and training program.
- Develop and implement employee review system.
- Management of employee benefits including 401(k), insurance, and paid vacation.
- Coordinate with service providers to ensure an outstanding client and employee experience with our facilities and technology.
- Identify and implement opportunities to improve team efficiency.
- Standardize processes to support scaling business.
- Coordinate with our compliance consultant in meeting regulatory requirements for firm operations.

Skills & Attitudes Required

- Friendly, confident, sincere approach to interpersonal relationships with high emotional intelligence.
- Strong work ethic and get-it-done attitude.
- Ability to balance and shift between detailed work, team leadership, and big-picture focus.
- High level executive function including organization, prioritization, sense of urgency, follow-through on non-urgent tasks, and time management.
- Outstanding written and verbal communication skills.
- Logical/analytical skills for problem solving.

- Minimum 5 years' professional experience with at least 2 years in financial services.
- Strong general computer skills including Word, Excel, and Outlook required. Experience with Salesforce Lightning, Morningstar Office, and Quickbooks a plus.
- Accuracy, speed, and attention to detail for record keeping and working with client data.
- Highest level of ethical responsibility and respect for client privacy.
- Commitment to core values of best interest of the client, respect, competence, professionalism, accessibility, and work-life balance.

About Keener Financial Planning

Keener Financial Planning is a fee-only financial planning and SEC-registered investment advisory firm with a primary office in Keller, TX and a satellite office in Dallas. As members of the Garrett Planning Network and NAPFA, our mission is to provide objective, expert financial advice tailored to each client's unique situation. With accessibility as one of our core values, services range from a la carte financial advice on an hourly or flat-fee basis to comprehensive financial planning and investment management.

We have a fun, supportive work environment. And yet, it's not easy. We work really hard to deliver an extremely high quality, consistent financial planning experience for each client. We served about 285 client households last year with a team of 7 people so we have multiple deadlines and deliverables every single week.

We are a growing firm. We will continue providing highly personalized service while scaling our business model with efficient processes, smart use of technology, and extraordinary people.

Director of Operations Position Details

The ideal candidate will enjoy the opportunity offered by a small firm to wear multiple hats and make an immediate difference. Because this is a new position, creativity in identifying areas to contribute and flexibility in developing the role is important. The ideal candidate will also be attracted to potential future firm ownership opportunities.

Competitive salary based on skills and experience plus quarterly bonus potential. Company paid health, dental, vision, life insurance, and holidays. 100% 401(k) match up to 6% of pay. After 90 days, employees are also eligible for open paid vacation time.

How to Apply

Cover letter and resume required. Please send to jean@keenerfinancial.com. Please use PDF or Microsoft Word format.