

Operations Specialist

Silver Oak Advisory Group is a mature, boutique financial planning and investment advisory firm in downtown Portland, Oregon. We are seeking an experienced investment and financial planning operations specialist to assist our team practice, who will embrace our collaborative culture and support our mission of guiding clients to make informed financial decisions that help give them the best possible chance at reaching their life goals. Our client-centric values include acting with honesty and integrity, striving for constant improvement and providing quality service and client satisfaction.

Qualifications

- Ability to thrive in a collaborative, small office environment
- Bachelor's degree with 5+ years operations experience
- Experience with portfolio management reporting system (Portfolio Center, Orion, Tamarac or similar)
- Experience with forms, processes and procedures at Schwab Institutional or similar
- Proficiency with Microsoft Excel
- Professional communication skills, both written and verbal
- Detail oriented, accurate, organized, and able to set priorities
- Self-starter that takes initiative and is independently motivated to improve processes

Duties and Responsibilities

- Generate periodic client reports and written client correspondence
- Assist clients and advisors with the administration of accounts (new account applications, transfers, trading, reporting, etc.)
- Compile and maintain client records and activities (CRM, portfolio management system)

Salary depends on experience and will be based on a national average salary of \$65,000 to \$85,000 per year. After meeting eligibility requirements, other benefits include group health insurance plan (employer contributes toward premiums), life and disability insurance, 401(k) plan with profit share, subsidized parking or mass-transit pass. Paid vacation days include all stock market closures plus ten personal days.

Interested applicants should send their resumes with a cover letter via email to hircops@silveroak.net. Silver Oak Advisory Group is an equal opportunity employer and considers all qualified applicants for employment without regard to race, color, religion, sex, national origin, or other legally protected characteristic. No phone calls or direct mail, please. No third parties.