Client Operations Analyst Job Description

True North Advisors is currently hiring for a **Client Operations Analyst** position. True North is an Independent RIA that serves the wealth management needs of high net worth individuals and institutional clients. This is a full-time support role that reports to the Director of Operations.

**Primary responsibilities include:**

Experienced service professional responsible for providing internal operational support for the Wealth Management team, including fulfilling client service requests, such as account set-up, account maintenance and money movement. Handles client paperwork and reports, communicates with clients regarding deliverables, provides status updates of requests and solves client service problems. Executes client onboarding and asset transfers. Maintains current client data and activity records in the firm’s CRM, assists client with online access to custodial sites and client portals, communicates with third party advisors to fulfill client requests (e.g. CPAs and attorneys), and completes special projects, as requested.

**Required Education, Skills & Experience:**

* Bachelor’s Degree preferred, and required to move beyond this role;
* Two to three years of relevant experience in the financial services industry; preferably in the operations or client service capacity.
* Problem solver, positive attitude, assertive, energetic, relational, proactive, reliable, accurate, quick learner, professional, observant, organized, proficient with technology, driven, strong attention to detail, ability to handle competing demands efficiently and calmly, focused on quality and accuracy, strong communicator.
* Excellent work references required, preferably from former direct supervisors.
* Must consent to and have favorable credit report and background check;
* Ability to exude the True North Values

**Benefits & Perks:**

* Competitive base salary;
* Target year-end incentive compensation of up to 20% of base salary, based on successful execution of firm goals and individual performance metrics;
* Generous PTO;
* Self-directed 401(k) program with employer contribution;
* Volunteer Time Off;
* Ability to telecommute up to two days a week after 30 days of employment;
* Employer reimbursement for successful completion of applicable professional designations and CE credits;
* Employee premiums for medical, dental, life and long-term disability insurance are covered 100% by employer;
* Employer contribution of $2,000/year into individual Health Savings Account, for all employees enrolled in our medical insurance;
* Free Financial Planning services for employees and their spouses;
* Fun and energetic work environment!

**Background:**

With wealth comes responsibility. As a respected, established, independent wealth management firm, True North Advisors is founded upon the principle of stewardship – the careful and responsible management of clients' financial assets to reach their goals now and in the future.

Clients can rest confidently that their advisor is looking out for their interests because he or she has taken the time to really get to know the client and their life goals. Clients can enjoy peace of mind knowing their custom fit financial plan is in place and is being carefully implemented. With that plan, clients can exercise financial discipline to handle emotions that could lead to costly mistakes. Clients have a clear guide to navigating the changing economic and market environment during their journey and to making sense of all the deluge of information coming at them. They have their True North.

True North was founded in 2000 with the vision of providing clients with a dramatically better service and wealth management experience than available at large brokers. The founders envisioned a firm and a team of people that would get up every day excited to help people achieve their financial life goals. They envisioned a firm that would be the best at what it does, a place that clients felt comfortable telling their friends about, and where industry professionals would vie for an opportunity to join the team. Years later, we are living that vision.