Data Integrity Associate

Position Description

PARTNERSINWEALTH is seeking to dramatically accelerate growth. We are looking for a mission-focused, detailed orientated and meticulous Associate, focused on financial data integrity and management, who takes pride in knowing all client data is accurately entered and easily accessible across the organization. This is an outstanding opportunity for a highly motivated professional who is jazzed by the thought of advancing with a rapidly growing organization.

Responsibilities

Reporting to the VP-Operations, the Associate will lead our asset management operations and have the following responsibilities:

- Support PCFO financial planning client presentations with pre-meeting prep, and capture detailed meeting action items for follow-up and input into our internal workflow system.
- Diligently monitor our data management workflows and make improvement recommendations that will drive efficiency and reduce costs.
- Daily download client financial data into our various applications; verify accuracy, troubleshoot errors and achieve resolution.
- Maintain our various software programs and applications.
- Calculate client fees, communicate the change to the client and facilitate payment of fees from client account; execute wire transfer of funds as instructed.
- Prepare investment and other forms and applications getting them ready for client signature.

Qualifications

Above all else, the successful candidate must believe in the core values of PARTNERSINWEALTH and be driven by our mission. Beyond that, we are seeking a candidate that has proven experience and passion for turning the data management aspects of a business into a well-oiled machine.

The successful candidate will have around 5 years of data management experience in a small business environment. Additional requirements are:

- Results — proven track record of exceeding goals and a bottom line orientation; consistently making good decisions through a combination of analysis, wisdom, experience, and judgment.
- Technology Acumen – demonstrated ability to innately understand technology, quickly learn new software; effortlessly resolve technology issues; effectively communicate with consultants. Working knowledge of ByAllAccounts, eMoney, TRX and Orion software a plus.
- People Skills – confidence interacting with older and highly successful clients, effective communication with team members and other stake holders.
- Action Oriented — enjoys working hard and looks for challenges; able to act and react as necessary, even if limited information is available; not afraid to make decisions.
- Educational Background — undergraduate degree required; business or a data intensive focused major a plus.
- Active FINRA Series 7, 63, 65 or 66 license, or financial services experience with the ability to successfully complete Series 65 within 60 days from date of hire.

To apply, please send resume and cover letter to jji@partnersinwealth.com.

About Us

Founded in 2000, **PARTNERSINWEALTH**'s mission is to lead our clients to an enduring financial peace of mind.

PARTNERSINWEALTH is a highly regarded financial advisory firm serving clientele in the greater Houston, Texas area. We are in the wealth management business serving as a **PERSONALCFO** for financially successful families. We have a succession plan in place to ensure that we'll be here 50 years from now.

This is a special opportunity, unlike most in the financial services industry. First, **PARTNERSINWEALTH** is prepared to offer an attractive compensation package for employees who demonstrate hard work, leadership and passion for our mission. Second, you will be a member of a collaborative and supportive team of strong individuals, passionately working hard to grow a successful and multigenerational business.

For more information, please visit www.partnersinwealth.com