

Part-time Office/Compliance Administrator & Advisor Trainee

We are looking for a conscientious, proactive problem solver – with a strong moral foundation.

Must be able to work within a team.

Compensation:

- \$20/hour – part-time FLEXIBLE hours.
- \$2.30/hour contribution to foster good / damper evil

Duties include:

- Answering/returning phone calls.
- Account management and processing/following up on paperwork with various custodians.
- Making clients feel appreciated.
- Assume responsibility for performing the compliance related tasks – assigned weekly by Smart-RIA. You will work with a 3rd party compliance firm to make sure we are compliant.
- Working with compliance firm and principal – to build custom compliance systems. You will be responsible for creating workflows in Retail DB – and working with IT to plug the new systems into the CUBE.

- Create and maintain clients' eMoney financial plans.
- Various other tasks that may arise.

CUBED Systems is a one advisor RIA – with 30+ long-term clients and \$40+ million in AUM. Currently maintaining the following professional designations:

- Accredited Investment Fiduciary - AIF®
- CFP Certificant®
- Certified Investment Management Analyst - CIMA®
- Certified Tax Specialist - CTS™

For the first time in almost 20 years – we are looking to accept new clients. Specifically – in 2024 we will begin to market to 401(k)s and other company sponsored retirement plans. And we will need to hire advisors to build relationships – not generate new business. These are salaried positions with benefits – plus a bonus (based on their clients being on track to achieve their goals).

Considerable time will be spent training the candidate – and teaching them to operate our proprietary Systems. Therefore, we will only consider candidates when there is a mutual expectation of long-term employment – upon graduation.

To enquire -please send an introduction / resume to
robba**ff**a@cubed.systems