**Job Description – Operations & Financial Planning Assistant**

Title: Operations & Financial Planning Assistant

**Job Summary:**

TrailWise Financial Partners (TFP) is a financial planning and business consulting firm located in Arvada, CO. Our culture is fast-paced, motivational, and focused on improving our clients’ lives. For more information about our company, please visit our website: [www.TrailWiseFP.com](http://www.TrailWiseFP.com)

TFP is seeking a Full-Time Operations & Financial Planning Assistant. We want a team member to join us in our mission of helping clients achieve their financial goals.

**Description:**

The Operations and Planning Assistant plays a critical role in the back-office functions of our firm. Responsible for the day-to-day operational duties of the firm, the Operations and Planning Assistant helps keep the office running smoothly and ensures that all client paperwork and financial data is handled in a timely, accurate, and professional manner. As this role grows, this person will be responsible for maintaining and implementing financial plans. We offer a great working environment with a collaborative, fun, and rewarding work environment for the right candidate looking for a long-term career.

**Responsibilities & Activities:**

* Process new accounts and account transfers
* Process new contributions and redemptions
* Process client service matters and money movement
* Respond to notifications
* Assist in scheduling client meetings
* Prepare client meetings
* Enter client data into financial planning software
* Manage client information to ensure that electronic files are complete, organized, and secure
* Assist with implementing and updating financial plans using eMoney
* Attend meetings as requested by the Advisor
* Handle miscellaneous operational activities
* Develop and maintain written systems of all activities
* Perform other duties assigned

**Knowledge, Skill, & Abilities:**

* Excellent attitude and an extraordinary client service orientation
* Bachelor’s Degree or equivalent experience
* A strong focus on getting the details right
* Excellent organizational and time management skills
* Ability to handle multiple tasks within tight time frames
* Ability to develop, document, follow, and track work processes
* Ability to resolve issues independently
* Proficiency with Microsoft Office Suite & comfortable navigating new software
* Strong analytical and research skills
* Strong verbal, written, presentation, and interpersonal communication skills
* Clean background check and credit check

**Helpful:**

* Previous securities industry experience; no licenses required
* Experience with financial planning software strongly preferred
* Interest in the financial planning industry and knowledge of financial markets and investment securities

**Compensation and Hours:**

Compensation depends on experience starting at $20/Hour

This is a full-time position, primarily in-office - 40 hours per week Monday-Friday

As a full-time employee, you will be eligible for 401(k) with match and profit share, healthcare, PTO and holiday pay.

If you’re interested in this opportunity, please send your resume and letter of interest to Yizeth at Yizeth@TrailWiseFP.com.

In your letter of interest, please address the following:

* Why are you interested in this role?
* What motivates you in a work environment?
* Provide two references from previous employers

**Disclaimer:**

The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed. This is an equal opportunity offering.