Client Relationship and Operations Specialist

(full-time, regular employment)

About AdvisorNet Financial

AdvisorNet Financial has been an innovative leader in the financial services industry for over 60 years. We provide the services and support independent financial advisors rely on to operate their firms efficiently and competitively. Over the years we've developed a vast network which allows us to provide our 300+ independent advisors access to the support services and industry partners that advisors in large institutions enjoy without having to be part of a large institution. For more information, please visit us at www.advisornet.com.

You will be a great fit if you enjoy working with people and data in a very dynamic, fast-paced environment. Our group requires people to be friendly, outgoing, and to thrive in an environment working on and in the business at the same time.

Portfolio Partners is growing within AdvisorNet and looking for an investment professional to join our team to grow with us. As Client Relationship and Operations Specialist, you will be the go-to resource for the Portfolio Partners clients and team. You will be a point of contact for client matters, anticipate the client's needs, manage projects and work within the company to ensure deadlines for the client are met, and help the client succeed. The ideal candidate will be highly motivated, detail oriented, and must have the ability to multi-task. Must also have strong organization skills and an interest in investment management. Come join a company that prides itself on growth and employee advancement in portfolio management!

Responsibilities

- Trade and reconcile accounts in a timely manner
- Generate proposals & IPS’s (Investment Policy Statements) as requested
- Aid advisors in recommendations related to proposal requests
- Onboard new clients (advisors)
- Maintain existing advisor relationships / client accounts by providing a high level of service
- Maintain all client and workflow related tasks and communications in Redtail (CRM system)
- Communicate in collaboration with marketing and compliance on investment strategies and portfolio updates
- Maintain compliance integrity and tracking of communications
- Respond directly to advisors and their support staff
- Recurring and ad hoc reporting for internal team and clients using software such as Tamarac and Redtail
- Investment and operational projects, as needed
- Additional duties as they arise

Qualifications

- College degree or higher, preferably in finance, economics, marketing.
- Series 7 and 66
- 3-5 years of experience of portfolio analysis
- Advanced experience with Tamarac or similar system, including the rules, managing the system, structure, and modeling
- Experience working on platforms such as NetX360, SmartWorks, Tamarac, SW Advisor Performance (SWAP), Albridge, Morningstar, Portfolio Center, or similar investment technologies
- Proficient in Microsoft Excel
- Someone who is positive, driven, creative problem-solver and devoted to being a team player, striving for concierge level customer service and maintaining a professional demeanor.
- Professional and personable presence, communication skills and phone skills
- Strong interpersonal skills required to develop team and client relationships

- Excellent follow-up and follow-through
- Organized, meticulous, detail-oriented and ability to multi-task
- Able to operate in a fast-paced environment

Disclaimer: This job description is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible job responsibilities, tasks, and duties. Responsibilities, tasks, and duties of the jobholder might differ from those outlined in the job description and other duties, as assigned, might be required.