Technology and Initiatives Manager

(full-time, regular employment)

About AdvisorNet Wealth Management

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. One of the many products and services we offer is fee-based investment management and financial planning services through AdvisorNet Wealth Management {AWM} - our Registered Investment Advisory (RIA) division. For more information, please visit us at www.advisornetwm.com. We also are affiliated with a nationally known broker dealer.

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 deliver over-the-top customer service. We are continually upgrading our technology, so savvy computer skills or ability to learn new systems is important.

Responsibilities

Overview:
The Technology and Initiatives Manager is a critical role, responsible for supporting many of the firm's systems and applications used by both the advisors and home office. This role is also the primary point person responsible for driving initiatives related to the AdvisorNet Wealth Management platform.

Major Areas of Accountability:

- Manage technology offerings related to advisor business processing, client reporting, workflow, billing, record retention, et.al while ensuring we are using competitive edge resources
- Interact daily with advisors, address and troubleshoot advisor requests, and answer advisor inquiries, or direct them to appropriate areas, in a timely manner
- Oversee the training program for advisors on technology offerings, policies and procedures and relevant topics, as necessary
- Cultivate strong vendor relationships regarding firm technology
- Serve as an effective advocate for advisors and clients by collaborating with multiple departments in order to ensure prompt and consistent delivery of excellent customer service
- Lead, manage and coordinate department projects and initiatives
- Commit to continuous education and professional development
- Develop cross-functional understanding of department policies, procedures, and responsibilities
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Qualifications

Required Attributes

- 5+ years of experience in the financial services industry
- B.A in Business or related field
- Experience with securities and investment advisory technology applications, preferably Black Diamond, Salesforce and Laserfiche
- Experience in project management
- Knowledge of SEC, FINRA, and state advisory regulations
- Personable, approachable with a positive attitude
- Able to work independently with superior problem solving, time and project-management skills
- Able to listen well and communicate in a professional manner (written, telephone and in-person)
- Able to manage multiple priorities and projects; prioritize, triage, and resolve conflict effectively
- Creative problem solver with the ability to anticipate needs and actively participate in a culture of excellence

Compensation

- Competitive base salary
- Comprehensive benefits package including: health, dental, vision, disability and life insurance available, employer HSA contribution and 401k match, paid time off, securities license maintenance, company events