**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 upon 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](http://www.advisornet.com).

AdvisorNet Wealth Management is the Registered Investment Adviser (“RIA”) for AdvisorNet Financial. We partner with entrepreneurial independent financial advisors on their technology, compliance, and operational needs in addition to offering a robust and unique “Circle of Services” for our financial advisors through AdvisorNet Financial. Our primary goal is to allow our advisors the time and opportunity to focus on what is truly important to them, while leveraging AdvisorNet for our expertise in the various back office, service, compliance, and operational functions that we conduct on behalf of our advisors.

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.

**Responsibilities**

* 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

**Qualifications**

* 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

*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.*