



Contact: Andy Klausner
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Job Title

Operations Associate (Wealth Management)

Company

Confidential

Location

New York City or Rye Brook, NY

Job Type

Full-Time

Salary

\$60,000 - \$65,000

Industry

Financial Services / Wealth Management

About the Company

A Wealth Management firm that works with families and businesses to help them execute and maintain their financial goals throughout their lifetime and for future generations. The firm offers planning services, insurance and investments.

Job Description

The Operations Associate will assist the firm's advisors in new business paperwork and proposals and work with other members of the home office team to ensure that client requests are met on a timely basis. The Operations Associate must have strong organizational and analytical skills and a keen sense of detail and be a team player and a self-starter.

Responsibilities

- Responsible for opening new accounts and for maintenance of existing accounts.
- Provide account administration services to advisors and communicate with them on a regular basis.
- Provide valuable operations advice and support to other team members.
- Meet and exceed advisor account needs and service expectations.
- Keeping advisory and client service team informed regarding client activity.



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Experience and Qualifications

- BA, preferred
- 2-3 years of operations experience
- Series 7,65 license, preferred