

## OPERATIONS MANAGER

Bellevue, WA

Operations | Full-time

Avier is one of Bellevue's fastest growing financial advisory firms and we are looking to hire an Operations Manager. Avier has a great culture that focuses on serving our clients well while having a great time doing it. We believe in a work life balance and we collaborate with team members to make sure work is accomplished. Avier focuses on the tech community and how to help tech executives maximize the benefits available to them through their work.

We pride ourselves on a culture of education, which is reflected in our highly credentialed staff. We have 8 CFP® professionals, 3 CFA Charterholders, and 2 MBAs.

The Operations Manager role is critical to supporting the client advisory teams. Each client has a 3-person advisory team that consists of a Lead Advisor, an Associate Advisor and a Client Service Associate. The Operations Manager ensures that internal team items and workflows are resolved quickly as well as placing trades as directed by the Advisory teams. Additionally, the Operations Manager interacts with financial custodians and vendor platforms to implement recommendations made by advisory teams and to maintain flow of data from various systems.

This position oversees client account setup and data transfer with platform and products such as custodians and investment managers, for the purposes of new account setup, money movement, portfolio accounting, trading and performance reporting. Will lead a larger team in time.

### OPERATIONS MANAGER ROLE

- Manager position that works with the Advisory Team and will work with Operations Associates in the future (as the team grows)
- Places trades accounts for current and new clients
- Rebalances client portfolios when asset classes fall outside of risk tolerance bounds
- Works with Client Service Associates to set up accounts with various custodians and makes sure funds are implemented correctly with proper tax preferences established
- Maintains Orion database and integrates data from custodians (TD Ameritrade, Fidelity, Schwab and the ByAllAccounts Portal within Orion)
- Uploads performance reports and miscellaneous items to Client Portal in Orion
- Will work to implement Eclipse Portfolio Rebalancing Software (Orion Add-On) with COO in 2022

- Tracks incoming client funds/positions and outflows
- Assists with management fees and billings
- Provides data for various, ad hoc compliance requests
- Tracks KPIs and updates on a quarterly basis
- Integrates data from other systems such as Salesforce, MoneyGuidePro, etc.

### **CANDIDATE EXPERIENCE**

- 2+ years of experience within financial services, preferably with a wealth management or financial planning firm; expected to be current with industry trends, terminology and concepts.
- Major in Financial Planning, Finance, or Economics a plus
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint) and expected to learn other position-related systems on the job.
- Good time management ability in order to handle multiple client relationship requests and contending priorities from other team members. Uses team member resources effectively.
- Knowledge of the following programs is a plus: Fidelity, TD Ameritrade, Schwab, Salesforce, Orion (or Tamarac) and MoneyGuidePro, etc.

### **COMPENSATION**

Avier provides competitive compensation across a variety of different areas. The Operations Manager position receives:

- Salary range: \$70,000 - \$110,000 (DOE)
- 401(k) match
- Insurance coverage with employer HSA contributions
- Flexible working schedules (ability to work remote)
- Paid time off
- Education reimbursement

Candidate compensation will vary by experience and is competitive with industry averages.

Reports to: COO and Managing Director

**Please submit resume and cover letter to:**  
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