Operations Specialist at **Adhesion Wealth Advisor Solutions**

Location: Charlotte, North Carolina Area

URL: http://www.adhesionwealth.com

Type: Full-time
Experience: Associate
Functions: Customer Service, Project Management, Accounting/Auditing
Industries: Accounting, Investment Management, Financial Services, Computer Software, Capital Markets

Job Description

The Client Service/Operations Department is responsible for providing industry-leading support to its clients. The Operations Specialist will organize, manage, and execute cross-department, client-related projects of high importance to the long-term relationship with the client. The Operations Specialist will fulfill a vial role within the Client Service/Operations Department. By coordinating large-scope, client related projects, he or she will ensure quality and timely service on all client-impacting projects.

Due to the rapid growth at Adhesion, the job description of the Operations Specialist is constantly evolving. Success in this department is based on an employee's ambition, flexibility, initiative, and willingness to learn. A positive, hard-working attitude is a must for the position.

PRIMARY DUTIES AND RESPONSIBILITIES

- Daily P&R – Complete daily posting and reconciliation of applicable client custodial data feeds.
- Project Coordination – Act in project management function for large-scope, client related issues, and as consultant to other teams in the company on special project expectation setting, planning and scheduling.
- Metrics – Maintain and measure metrics in relation to turnaround time and revenue related to special project completion.
- Management Reporting – Proactive communication of status updates for projects with specific expectations and delivery dates.
- Issue Resolution – Provide daily support, data issue resolution, and daily request processing for Clients. Client Communication – Act as the main point of contact for client-related, tactical issues, both internally and externally.
- Client Implementation – Manage the New Client Implementation process for assigned clients, along with other large-scope client related issues as needed.
- Product Enhancement – Assist in the collection and prioritization of product enhancement requests; participate as stakeholder in product documentation efforts, and support product user acceptance testing efforts to ensure quality of product platform for client use.

Skills

- Industry Knowledge – An overall understanding of investment vehicles.
- Communication Skills – Strong written and verbal communication skills.
- Technology – A working knowledge Microsoft Office applications. Experience with Schwab's PortfolioCenter, or other accounting platform.
- Interpersonal Skills – Ability to build effective interpersonal relationships.
- Organizational Skills – Exemplary problem-solving and organizational skills.
- Responsibility and Initiative – Ability to work independently in an efficient and responsible manner.
- Teamwork – Experience working with others in a team environment.
- Project Management – Experience managing all aspects of large-scope, client-related projects, including task allocation to others as needed for successful project completion.

Company Description

Adhesion Wealth Advisor Solutions is a company focused on providing innovative solutions for registered investment advisors. The WealthADV Platform from Adhesion is a comprehensive Managed Investing solution, providing model-based unified managed accounts, overlay & tax-optimized portfolio management, distinctive client reporting and managed back office services. With WealthADV, advisors stay at the forefront of the market and have a scalable, multi-custodian platform upon which to grow successful practices.

Additional Information

- Local candidates only, no relocation (Charlotte, North Carolina Area).
- No third party applications.