

Position Background:

Asset Strategy Advisors, is an independent investment advisory firm providing consulting, planning and investment management services to institutional and private investors. We are looking for a self-driven, results-orientated person with a positive outlook as a full time **Operations Manager** in our Natick MA location (near Exit 13 off MassPike (Rt 90)).

A personable, organized multi-tasker, who is comfortable dealing with clients and company executives. Must be a detailed, deadline orientated person, as position requires time sensitive work. We are looking for someone who is reliable, personable, businesslike and has excellent telephone & customer service skills. (Experience with the Fidelity IWS or Envestnet platforms a plus). Familiarity with CRM (client relationship management) software also preferred.

Responsibilities include:

- Client Service
- Administrative support for financial consultants.
- Process and track investment applications.
- Create documents in MS Outlook, Word, Excel and Power Point.
- Business letters email and correspondence.
- Preparing and distributing client reports
- Manage customer calls
- Oversee our CRM (client relationship management) system
- Monitor client accounts, both corporate and personal.
- Set appointments and manage meeting logistics.
- Oversee day to day details of office.
- Work independently in a private office setting
- Looking for full time, but part time may be acceptable, with a commitment to minimum 25-30 hours per week.

Must be local, not a telecommuting role.

401k

Medical reimbursement

Paid Vacation

Education Credit

You would be joining this successful and growing team with potential for long term career opportunities. Our office is cohesive, fast paced and professional. We provide our clients with extraordinarily high level of service. A significant component of this service is our operations support.

Please submit cover letter and resume to info@assetstrategy.com

No telephone calls please. **Please include your LinkedIn link as well.**