At APCM Wealth Management for Individuals (AWMI), we are a team of smart, driven, and capable professionals who enjoy autonomy and flexibility due to the respect we have for each other. Together we approach our work of defining team goals, and the tasks to achieve them, with energy and passion. Individuals' strengths and interests are fostered through continual professional development and mentoring. We are looking for a dedicated professional who values the trust instilled in us by our clients and thrives in a team environment.

Summary: The Operations Associate is an entry level position that provides project-based support for the firm's back office and client servicing. This role is responsible for the procedures and workflows that ensure we operate at the highest level to deliver the best servicing to our clients.

This position offers an excellent opportunity for growth in the financial operations profession. AWMI strives to offer a rewarding career path, while providing valuable experience in the areas of financial operations in a boutique professional team environment.

Operations Associate	
Client Responsibilities	Interact with clients on Schwab onboarding and ongoing account management support tasks
Team Responsibilities	Be a great teammate, excellent communication skills across advisors, operation team, and leadership
Firm Responsibilities	Understand and support the firm's vision, mission, and values Engage in and lead teamwork and teambuilding activities and integrate into and promote the culture of the firm
Growth Responsibilities	Participate in guiding technology needs and provide niche expertise in technology for the current management and future growth of the firm
Degrees and Designations	College graduate or commensurate experience in the financial industry
Experience	Zero to three years
Preferred Skills	Strong written and oral communication skills Manage complex workload Experience with the firm's core systems; Microsoft 365 and Office platform, Teams telephone Knowledge of data systems, Orion, Salesforce
Skills to Develop	Participate in the development of protocols and procedures Ability to collaborate across committees to integrate system functions and efficiency Advanced knowledge of custodian Charles Schwab Professional networking and community involvement encouraged
Performance Measures	Advancement of technical skills

	Proficiency in firm software, technology, workflows Development of oral and written client communications Participation in team dynamics
Compensation	Full-time salaried position with standard benefits package; 401(k) and Cash Balance Pension plans; incentive and discretionary bonus plan

Additional Details on Anticipated Responsibilities and Duties:

- Maintain excellent client service through the efficiency of workflows that include, onboarding new clients, facilitating Schwab paperwork, maintaining accurate data across systems

- Learn and continue to build knowledge of Salesforce to support the workflows of marketing, sales, and advisors

- Cross-train and provide backup support to Operations Specialists within Orion

- Participate in strengths-based team exercises, based on CliftonStrengths assessment

- Attend team meetings, volunteering for research, new initiatives, and management projects for the internal operation of the team

Career Path:

This position is expected to progress from Associate to Specialist. Mentoring will be provided to promote skills for excelling at your position, contributing to the business beyond standard job functions, and promoting your development.

Firm Values:

- Clients will always be top priority
- An engaged team contributes maximum energy for a great work environment
- Ensure a successful business to serve clients for decades to come
- Learn and grow as industry experts with the highest credentials
- Work and life balance is part of our culture