



Operations Team Member

We are seeking an entry level Operations Team Member for our fee-only wealth management firm in Las Cruces, NM. Such an individual will desire to work in a team-oriented independent RIAfirm; will be involved in all aspects of the business, learning, and shaping the way we care for our clients. Candidates that fit into our firm and culture will embrace technology, enjoy a collaborative environment, and hold in high regard serving clients in a fiduciary capacity. We value our clients, and our clients value our services.

Position Highlights

The Operations Team Member will play a crucial role in the firm's daily operations, back-office technology, client reporting process, and client experience. This position will maintain an intimate knowledge of technology applications, custodial requirements, and workflows.

Specific Areas of Focus Include:

- Prepare and review required account opening documents for completeness, accuracy, and set-up accounts.
- Engage in day-to-day operational activities that support the advisor's ability to deliver excellent client service.
- Ensure all transaction processing follows internal procedures and compliance regulations.
- Prepare client reports.
- Provide support for processing client service needs
- Process incoming mail, including check logging.

Qualifications

- Experience in the field desirable, although not required, as this is an entry-level Operations position with career development. For candidates without financial industry experience, other professional experience is preferred.
- Knowledge of investment products
- Knowledge of cash reconciliations
- Strong organization, time management and analytical skills
- Excellent communication skills
- Self-starter, productive, works well with a team and independently.
- Attention to detail and understand the importance of data accuracy.
- Ability to identify issues and drive for resolution.
- Ability to identify, meet, and follow through with client needs and requirements with keen attention to detail.
- Excellent project management skills with ability to prioritize and track multiple tasks.
- Aptitude for learning and working in a service and team environment with a sense of urgency.
- Proficiency in Microsoft Office Suite
- Knowledge of CRM (i.e., Elements) and Black Diamond a plus

Perks

- Competitive compensation and benefits
- Reimbursement of approved professional development expenses
- Customized career development process
- 401(K) and company matching
- Health care benefits

Westwind Capital, LLC is an Equal Opportunity Employer

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