CREEKMUR
WEALTH ADVISORS

Investment Operations Associate – full time

As a growing wealth management firm we are seeking an Investment Operations Associate to join our team in our mission of helping clients make wise financial and life decisions to accomplish their goals. This is a key role with the opportunity to grow and advance your career by helping to continuously improve the operations of a private wealth management firm. If you enjoy working with an energetic motivated team, helping others succeed, and continually challenging yourself to improve, then we would love to hear from you!

Description

We are seeking a hands-on team player to join our Operations Department. This individual will serve as a primary point of contact for new & existing clients to ensure that each one has outstanding experiences. This would include regular communication by phone, email, and/or text, preparing new account applications and other service forms needed, and monitoring each activity until completed. This individual will have opportunities to work with our team on company-wide initiatives as well as provide input to the team in our effort to continually improve each process.

Benefits & Salary

- Salary Range - $45,000 - $60,000 dependent upon experience
- 401(k) with employer match
- Health Insurance
- Vacation & Paid Holidays
- Great team culture

Responsibilities & Activities

- As an Operations Associate, you should be highly motivated, detail-oriented, and enjoy helping people accomplish their goals and objectives.
- Manage client interactions and expectations (complaints, concerns, etc.) as well as internal relationships.
- Prepare and process investment account applications.
- Make necessary inquiries at investment companies, insurance companies and other outside companies.
- Actively engage with our larger Operations and Client Service Teams toward company wide initiatives.

Experience & Personal Qualities

- College coursework in a related field a plus
- At least 2 years of experience in the financial services industry.
- Knowledge of Excel, Word, Outlook and Adobe Acrobat. Familiarity with financial industry software a plus.
- Excellent oral and written communication skills; customer service experience preferred
- Strong administrative skills and attention to detail
- High standards of professionalism and confidentiality
- Ability to manage your time effectively and to coordinate multiple tasks at once.
- Ability and willingness to learn new skills and to find answers to problems on your own.

For more information about our company, please visit our website at www.creekmurwealth.com

If you're interested in this opportunity, please send your resume and letter of interest to Stacy Creekmur
stacy@creekmurwealth.com