Operations Associate

Location: Boise, ID

About Perspective Wealth Partners

Perspective Wealth Partners (PWP), founded in 2006, is a fee-only SEC-registered RIA, located in Boise, Idaho and serves about 250 households with approximately $700MM in assets.

We are seeking an experienced and proven professional who desires to be an integral part of a small team, while making a deep impact on clients. The firm currently has ten employees, seven advisors and two members of our operations team.

PWP offers clients a wealth management experience that allows them to relax and have confidence pursuing their intentions. We are obsessive about optimizing after-tax return for our clients. With CPAs on staff, our clients rely on us for in-depth tax planning and analysis.

In tandem with providing a first–rate wealth management experience, we are also purposeful about helping our clients live meaningful lives, thereby being a trusted thought-partner in non-financial areas.

As a fiduciary to our clients, PWP is legally obligated to provide investment portfolio management and financial planning that is in a client's best interest without selling any products or receiving commissions.

We are deeply intentional about our internal culture and core values, which are comprised of: being service oriented, committed to excellence, heartfelt, relatable, and genuine.

PWP is an Equal Opportunity Employer. We support diversity in the workplace and embrace diversity in the clients we serve.

Position Description

In this role you will work with a small operations team in support of the advisory staff to deliver value to Perspective Wealth Partners and its clientele. Your broad set of responsibilities will vary: from understanding each advisor's unique needs, aiding the development and implementation of new/current processes, administrative tasks, assisting with office management, maintaining data accuracy, and leveraging technical tools. A good part of our service involves ongoing value-add activities that optimize "net return" for clients. These activities require tight adherence to deadlines, vast organizational skill, and quick pivots. Our client base requires a holistic approach to effective planning, which necessitates the need to learn quickly as client and advisor needs, tax environments, and markets evolve.

Core Responsibilities
Current & New Client Services

- Manage administrative tasks associated with onboarding new client accounts through internal process flows, including establishing new accounts and account transfers
- Fulfil advisor requests on current client accounts
- Assist with office management tasks
- Professionally communicate with clients about the administrative needs on their accounts
- Maintain electronic client records; manage and continuously improve use of CRM system and electronic documents
- Assure key client information and documentation is complete, up-to-date, and well-organized

Operational Development

- Provide support for internal processes such as compliance, billing, operation of CRM and portfolio management software, and other technologies
- Prepare, distribute, and optimize reports from our various practice management suite of tools
- Assist operations team in new initiatives and daily task management

Team Member and Collaborative Partner

- Work closely with Advisory Team to provide support and identify opportunities for greater efficiency
- Promote an ethos of compliance within the advisory team by following and enforcing firm policies and procedures and all applicable compliance rules and regulations
- Relish opportunities to foster and add to Perspective Wealth Partners' rapidly forming culture

Interpersonal Qualifications

- A passion for service and building deep working relationships
- Exceptional attention to detail and advanced organizational skills
- Embraces personal development and feedback
- Ability to work and multi-task in a fast-paced, evolving environment – can pivot quickly
- Comfortable with a broad set of responsibilities

Education/Experience/Technical Qualifications

- Bachelor's degree or equivalent experience
- Data-driven and highly analytical
- Strong MS Excel skills & experience **required**
- Knowledge and experience with fin-tech software and systems is a plus: Charles Schwab, Orion, Redtail, YCharts, or others
- Well-developed technical capabilities—can grasp and use new tech intuitively

Compensation & Work Location
PWP offers competitive compensation including salary and bonus, 401(k), health insurance, and paid time off (PTO). We benchmark compensation to market and strive to pay above-market given our small firm size and broad responsibilities.

Total Compensation Range: $60-75k, depending on experience.

Hybrid Schedule: Remote Monday and Friday, in office Tuesday, Wednesday, Thursday

Application Process

If interested, please email a resume and cover letter to position@perspectivewealth.com and use “Operations Associate” in the subject line.

In the cover letter please describe why this position is of interest to you.

Given the critical nature of who we are in the lives of our clients and the intention we use in crafting the culture of our firm, our hiring process will be rigorous, involving multiple interviews. If you’re up for this rigor, we look forward to hearing from you.