Operations Associate | Technology & Innovation

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 280 households with approximately $1B 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 eleven employees: seven advisors, three operations team members, and one tax team member.

PWP offers clients a wealth management experience that allows them to relax and confidently pursue their intentions. We are obsessive about optimizing after-tax returns 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 the 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 alongside a small operations team to support our advisory staff and deliver value to Perspective Wealth Partners and its clients. This is a varied role that combines day-to-day operational and administrative responsibilities with a strong focus on technology, innovation, and continuous improvement.

You will help maintain accurate data, support internal processes, assist with office management, and respond to the unique needs of our advisors. At the same time, you will play an active role in identifying opportunities to leverage technology to improve workflows, streamline processes, and increase efficiency across the firm. We are looking for someone who is genuinely curious about technology, excited to explore new tools and capabilities, and motivated to stay ahead of an ever-evolving technology landscape. You will help evaluate and implement solutions, explore practical applications for AI and automation, and find ways to translate new capabilities into meaningful improvements for our team.

Success in this role requires strong organizational skills, attention to detail, adaptability, and the ability to manage competing priorities and meet deadlines. Our work involves ongoing value-added activities designed to optimize clients' net returns, and our holistic approach to financial planning requires us to continually adapt as client and advisor needs, tax environments, markets, and technology evolve.

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Core Responsibilities

Technology & Innovation

- Assist with the selection, implementation, and ongoing maintenance of technology solutions that support firm operations.
- Coordinate with IT consultants and vendors to troubleshoot and resolve technology issues as they arise.
- Develop expertise in AI and emerging technology solutions and help identify opportunities to expand their effective use across the firm.
- Stay informed on technology trends, software updates, and new capabilities relevant to the firm, and communicate applicable opportunities to the team.
- Provide support for internal processes as needed, such as compliance, billing, operation of CRM and portfolio management software, and other technologies.

Current & New Client Services

- Manage administrative tasks associated with onboarding new client accounts through internal process flows, including establishing new accounts and account transfers.
- Fulfillment of advisor requests on current client accounts.
- 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.
- Assist operations team in new initiatives and daily task management.

Team Member & 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.

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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 multitask 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
- Experience utilizing AI for process improvement and efficiency
- Knowledge and experience with fintech software 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 against the market and strive to pay above-market given our small firm's size and broad responsibilities.

Total Compensation Range: $80-100k, depending on experience.

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

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.