Wealth Management
& Consulting Services

ASI Wealth Management is looking for an operations specialist to join our growing team in the Bend office. This is a rare opportunity to join a successful investment advisory firm with over $1.4 billion in assets under advisement. We are looking for a team-oriented, client-focused, organized, and efficient individual with a positive, can-do attitude. This is an excellent opportunity to advance your knowledge in the investment industry and work with a fun, cohesive team. This is a full-time position, with excellent benefits. Compensation based on experience.

KEY JOB FUNCTIONS include but not limited to:

- Coordinate and execute client service requests
- Client paperwork – existing client needs and new client account documents
- Client account billing management
- Interaction with account custodians
- Maintain portfolio management data, including daily transactions, positions, reconciliations
- Assist with maintaining/updating CRM (client/contact relationship management software)
- Other general administrative duties include filing, scheduling, and handling mail
- Work alongside a seasoned operations team with average experience of 24 years

Required Skills & Experience:

- Proficient in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook)
- Intermediate Excel skills
- 2+ years working in investment management office setting
- Proficient with portfolio management database
- Enjoys working with professional team and interacting with clients
- Independent worker
- Strong communication skills
- Proven Customer Service skills

Desired Skills & Experience:

- Bachelors degree in business/finance
- Proficient in Tamarac software; Reporting, Trading, and/or CRM
- Proficient in PortfolioCenter software

Email your resume to ASI Wealth Management at info@asiwealthmanagement.com

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