

Office/Operations Manager - Job Description

Overview

This full time, permanent position allows the successful candidate to work for a fee-only comprehensive financial planning firm in the west Houston (TX) area. The candidate will assist advisors to provide financial planning services to clients by undertaking the following responsibilities:

- Maintaining office operations and procedures
- Overseeing payroll and benefits administration
- Reviewing and analyzing company financials for management review
- Design, develop, implement, and coordinate systems, policies, and procedures
- Coordinator of Disaster Recovery Plan (DRP) for natural disasters/ inclement weather
- Identify problematic areas and implement strategic solutions
- Work with our IT vendor to ensure security of data, network access and backup systems
- Renewing vendor agreements, insurance policies, rental agreements, etc.
- Preparing and filing annual property tax submission and auditing payroll tax payments
- Coordinating administrative responsibilities for SEC compliance
- Negotiating and interfacing with service companies on projects
- Lead for firm for cybersecurity training and awareness for employees
- Consulting with management team on decisions that impact staff
- Administering orientation and training of new hires

Qualifications:

We are seeking a candidate with the following qualification and capabilities:

- Bachelor's degree
- Minimum 5 years of experience of operations/administration/HR experience (experience within financial planning industry highly preferred)
- Project management experience with evaluating, executing, and implementing projects
- Ability to identify and implement business process improvements
- Ability to identify and diagnosis operational issues and understand root cause analysis
- Highly ethical, strong reasoning, sound judgment and professional appearance and demeanor
- Trustworthy and committed to maintaining confidentiality
- Experience in project management/strategic planning
- Proactive in planning and thinking
- Extraordinary level of curiosity to ask questions and seek to continue to learn
- Strong analytical and organizational skills
- Borderline obsessive attention to detail with an eye for identifying missing or conflicting information
- Excellent writing, listening and communication skills
- Ability to work independently and in a team environment
- Proficiency with QuickBooks or similar bookkeeping software
- Strong computer skills with a working knowledge of all Microsoft Office applications (Word, Excel, Outlook and PowerPoint)
- Experience with Microsoft Access database software a plus
- Ability to handle a wide variety of tasks, and manage several tasks simultaneously with varying deadlines

Crystal Cornett, Legal Recruiter
ccornett@nnlegalsearch.com