



WEALTH MANAGEMENT INVESTMENT CONSULTING

Job Title: Operations/Reporting Analyst

Location: Morristown, New Jersey

About Massey Quick Simon

Massey Quick was founded in 2004 to create a different kind of wealth management – one that suits its clients' best interests as a fiduciary by seeking to align the firm's goals with those of our clients and offer objective professional advice. On April of 2017, we underwent a merger with William E. Simon & Sons, our two firms have joined to form Massey Quick Simon and together we provide wealth management, investment consulting and family office services to high net worth individuals, families, endowments, foundations, and single-family offices.

Why Work at Massey Quick Simon?

Massey Quick Simon's culture and company philosophy are founded on a set of fundamental values that influence the choices we make and the actions we take. Our core values encompass integrity & honesty, mutual trust & respect, ownership & accountability, and humility. We provide opportunity, nurture talent, develop our people and reward achievement. You will be joining a culture that promotes functional excellence and teamwork, a passion for learning, and values employee input to help shape the future of the firm.

Duties & Responsibilities

This role will report to the Head of Reporting and provide support liaison between client advisor teams and our reporting provider. Some job duties include:

- Monitoring account data feeds
- Management and oversight of alternative fund communications and notices
- Quality check of asset valuation and performance data
- Management of deliverables to clients
- Maintaining of client facing portal
- Management of password database
- Assisting with onboarding and termination of clients by creating/deleting report templates, updating tracking spreadsheets, and helping with legacy investment reporting

Attributes

- Foster a positive atmosphere within the office and with clients.
- Display team-oriented, collaborative spirit.
- Present professional behavior, appearance, and etiquette at all times.
- Ability to work under multiple managers in a dynamic environment.
- Ability to work at a high level of independence.

Qualifications

- Strong background in Microsoft Office Suite, with an emphasis on Outlook and Excel
- Helpful to have experience with TD Ameritrade
- Performance reporting experience is a plus
- Highly organized
- Time management
- Attention to detail
- Ability to work with multiple departments
- Self-starter
- Natural instinct for problem solving

Application Process

To apply, please submit a cover letter and resume to jobs@mqsadvisors.com and complete the online application at http://www.hrmcclaim.com/ho3/abw/job_redirect.asp?did=98&jid=316