



Chief Operating Officer

Novare Capital Management is a privately owned investment management firm that uses a comprehensive approach to serving our clients by providing investment management, financial planning, estate plan review and family financial education services. Our team has extensive experience and industry knowledge as well as several prestigious designations including CFP®, CFA, MBA, JD, and ChFC® providing the candidate with a strong career development resource and mentoring framework.

Position: This is a senior level management position reporting to the managing directors. The Chief Operating Officer (COO) will take a leadership role in overseeing, building and implementing the firm's systems, processes, workflows and procedures that will allow for continued excellence in client service for this growing firm. Candidate will help lead the firm's growth from \$1 billion to \$2 billion in the next 3-5 years. Functional responsibilities include:

Operations

- Personnel management- manage, recruit, train and maintain an adequate personnel staff
- Process management and control- develop and maintain an efficient process in client onboarding, client service and advisor support
- Systems control- analyze and maintain process software and systems

Human Resources

- Recruiting- acquire new talent through multiple sources: social media, third party vendors, website
- Benefits management- work with insurance providers to manage the company's high-quality employee benefits package
- Internal review process- manage the company's internal employee annual review process

Technology

- Work with company's MSP (managed service provider)



- Systems management
- Software management
- Hardware management
- Cyber security management

Qualifications

- Bachelor's degree plus an advanced degree is required
- 10+ years' experience in the financial services industry. RIA or brokerage experience a plus. Operations and HR experience necessary
- High critical thinking skills
- Strong process and planning orientation with a high attention to detail
- Proven manager that enjoys being part of a team with a passion for client service
- Team player with exceptional interpersonal skills and excellence in both written and verbal communication

Compensation and Benefits

- Competitive salary with a performance-based bonus program
- Health Savings Account and company subsidized health insurance plan
- 401(k) Retirement Savings Plan with company matching
- Profit Sharing Plan

Novare Capital is an Equal Opportunity Employer

We extend equal employment opportunities to qualified applicants and employees on an equal basis regardless of an individual's age, race, color, sex, religion, national origin, disability, sexual orientation, gender identity or expression, pregnancy status, marital status, military or veteran status, genetic disposition or any other reason protected by law.

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