NOVARE
CAPITAL MANAGEMENT

Wealth Management Operations Associate

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: Position provides the candidate with the opportunity to participate in several disciplines of a boutique RIA firm. We look for the candidate to help us sustain our high standard of excellence. Responsibilities will include:

Operations and Systems Management

- Prepare and generate client presentations and quarterly performance reporting implementing established protocols and procedures while further developing efficiencies and enhancements.
- Manage and maintain information in various software databases including Junxure, Tamarac Reporting, Portfolio Center, and MailChimp.
- Assist in the production of composite reporting and required SEC filings.
- Update and maintain marketing materials and presentations.
- Contribute to strategic planning and exchange of ideas to develop enhanced best practices.
- Work with Alternative Investments serving as a key liaison for external partners from initial setup through account opening and tracking of performance. Includes follow-through on capital calls and record keeping.

Client Service

- Execution of new client account documents and continued account maintenance while providing excellent, accurate and timely service.
- Resolve complex client issues utilizing relevant internal technology solutions to effectively manage client requests, while ensuring client expectations and deadlines are met.

a trustworthy partner every step of the way.

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Qualifications

- Bachelor's degree and 5+ years' experience in the investment management field. Previous securities license or experience with a RIA or brokerage firm. Series 7 background helpful, but not required.
- Experience serving high net worth clients.
- High attention to detail with ability to see projects and open issues through to resolution.
- Team player with exceptional interpersonal skills and excellence in both written and verbal communication. Candidate enjoys collaborating with colleagues and is willing to assist in all aspects of an RIA firm.
- Quick learner with ability to interact in a professional manner at all levels, both internally and in client facing role. Superior multi-tasking and organizational skills.
- Strong computer skills including proficiency with Microsoft Office Suite, CRM and accounting software, preferably experience with Tamarac Reporting and Portfolio Center. High degree of proficiency with Excel.
- Ability to work independently in a dynamic work environment. Demonstrates critical thinking skills and ability to effectively prioritize and troubleshoot.

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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