



# SIMON QUICK

## ADVISORS

**Job Title:** Operations Analyst  
**Location:** Morristown, New Jersey

### **About Simon Quick Advisors**

Simon Quick Advisors is a wealth management and investment consulting firm that advises high net worth individuals and families. Simon Quick Advisors is an independent registered investment advisor (RIA) offering customized integrated financial planning and investment solutions. The firm has offices in Morristown, NJ, New York, NY, and Los Angeles, CA, Chattanooga, TN and Denver, CO.

### **Why Work at Simon Quick Advisors?**

Simon Quick Advisors' 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**

Examples of job duties include:

- Management and oversight of alternative fund communications and notices via Outlook and DocuWare
  - Management of password database using Dashlane
  - Monitoring the reconciliation of 2500+ alternative investment accounts on the firm's performance reporting software, Fortigent.
  - Review of performance consistency across investors within the same investments
  - Data entry: market value entry and transaction entry into Fortigent
  - Daily/Weekly transaction reports circulated to the firm
  - Assisting Head of Reporting on client onboarding management and related projects
  - Quarterly billing assistance
  - Trading and money movement assistance
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## **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, with an emphasis on Word, Outlook and Excel.
- Superior organizational, time management, and written/oral communication skills.
- Process-driven and proactive with a natural instinct for problem solving.
- Excellent attention to detail and analytical skills.
- Self-starter and ability to work with multiple departments within the firm.
- Preference will be given to candidates with experience in the financial services industry.

## **Salary & Benefits**

- Salary and bonus are competitive based on industry standards and experience level.
- Benefits include dental, vision, health care, and 401(k) with a discretionary company match.
- Financial support for professional accreditation and continuing education requirements.
- Transparent open-door culture and friendly working environment.
- Every employee is provided with a dedicated mentor and career path guidance.

## **Application Process**

To apply, please submit a cover letter and resume to [jobs@simonquickadvisors.com](mailto:jobs@simonquickadvisors.com) and complete the online application at <https://simonquickadvisors.com/our-firm/careers>

Simon Quick Advisors, LLC is an Equal Opportunity Employer and we do not discriminate against any employee or applicant for employment because of race, color, sex, age, national origin, religion, sexual orientation, gender identity, status as a veteran, and basis of disability or any other federal, state or local protected class.

