

## **Operations Manager – Job Description**

**Position Title:** Operations Manager

**Reports To:** Lead Advisor & Business Owner

**Department:** Operations

**Status:** Full-Time / Salary

**Location:** ClearVista Financial

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### **Position Summary**

The Operations Manager is responsible for overseeing and improving the internal operations of ClearVista Financial. This role ensures the firm runs smoothly by coordinating workflows, improving processes, managing projects, and supporting team alignment. The Operations Manager works closely with the Lead Advisor, Junior Advisor, Client Operations Assistant, and Marketing & Communications Manager to maintain an efficient, organized, and client-focused environment. This role protects advisor capacity, strengthens the firm's infrastructure, and enables consistent, scalable growth.

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### **Key Responsibilities**

#### **Operational Leadership & Process Development**

- Develop, document, and maintain standard operating procedures (SOPs) across the firm (in-progress process manual).
- Identify areas for operational improvement and recommend workflow enhancements, including opportunities to leverage AI and automation.
- Support the adoption of new processes and tools by providing clarity, training, and reinforcement to team members.
- Ensure operational consistency across client servicing, meeting preparation, follow-ups, and internal communication.

#### **Project & Workflow Coordination**

- Coordinate cross-team projects including client events, system updates, process improvements, and operational initiatives.
- Track deadlines, deliverables, and follow-up tasks to maintain project momentum.
- Help implement and optimize workflow tools, automation systems, and integrations to improve efficiency and reduce manual work.
- Prepare meeting logistics, ensure team readiness, and monitor completion of action items afterward.

- Partner with the Marketing & Communications Manager on event coordination, communication timing, and execution (not managing marketing but acting as a thought partner).

### **Advisor & Team Support**

- Assist with meeting preparation including agendas, materials, summaries, and task delegation, leveraging technology and AI tools where appropriate.
- Route tasks appropriately to the Junior Advisor, Client Ops Assistant, or MarComm Manager as needed.
- Serve as a central resource for team questions, helping maintain alignment and workflow clarity.

### **Cross-Department Communication**

- Act as the operational “hub” of the firm by facilitating smooth communication between departments.
- Ensure internal processes flow seamlessly across advisors, client operations, and marketing/communications.
- Help prioritize team workload based on business needs and upcoming initiatives.
- Identify potential bottlenecks early and propose solutions, including automation or system improvements where appropriate.

### **Office & Administrative Oversight**

- Maintain the organization of digital and physical files, systems, tools, and resources.
- Coordinate with vendors, tech platforms, custodians, and service providers as needed.
- Support internal compliance documentation with oversight from the Lead Advisor.
- Assist with operational reporting, tracking, and internal improvements, including evaluating tools that enhance efficiency and scalability.

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## **Qualifications**

### **Required**

- Strong organizational skills with the ability to prioritize and manage multiple projects simultaneously.
- Excellent written and verbal communication skills.
- Ability to create structure, improve processes, and bring clarity to workflows.
- Comfort working cross-functionally with advisors, operations, and marketing teams.
- High level of professionalism, discretion, and client-service orientation.

### **Preferred**

- Experience in financial services, wealth management, or a professional services environment.
  - Familiarity with CRMs, custodial platforms, or workflow/project tools.
  - Interest in growing into a higher-level operations leadership role long-term.
  - Securities Industry Essentials (SIE), Series 7, or Series 66 licensing (not required, but strongly preferred).
  - Proficiency with AI tools and automation platforms, with the ability to identify opportunities to improve efficiency, streamline workflows, and support scalable operations.
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### **Success Metrics (KPIs)**

Performance in this role is measured by:

- Improved operational efficiency and clearer processes.
  - Reduced bottlenecks and smoother cross-team workflows.
  - Timely completion of projects and initiatives.
  - High-quality meeting preparation and follow-through.
  - Increased advisor capacity and reduced administrative burden.
  - Positive internal team feedback regarding communication and support.
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### **Work Style & Competencies**

- Proactive problem solver.
  - Strong attention to detail.
  - Systems thinker.
  - Collaborative and approachable.
  - Able to anticipate needs and maintain momentum.
  - Comfortable working in a fast-paced, client-focused environment.
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### **Position Impact**

The Operations Manager plays a critical role in the firm's stability and growth. By providing structure, improving processes, and coordinating team operations, this position directly enhances the client experience, strengthens internal efficiency, and supports the business owner in advancing the firm's long-term goals.

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### **How to Apply**

To apply, please submit your resume and a short cover letter expressing your interest and alignment with the firm's values to [info@clearvistafinancial.com](mailto:info@clearvistafinancial.com)