

OPERATIONS ANALYST

Reports to: Director of Finance and Business Management – Fairport & Luma Wealth
Location: Cleveland, OH, Buffalo Grove, IL, Harrisburg, PA
Benefits: Yes
Status: Full-time

JOB PURPOSE

Fairport & Luma Wealth is looking to add a qualified individual to the existing Operations department of a growing, regional RIA. This person would have responsibilities serving the multi-office enterprise. There is room to grow within the department, as it scales mirroring firm growth. The Analyst would be involved in most day-to-day operations of the firm. RIA and or Custodian experience a big plus.

DUTIES AND RESPONSIBILITIES

- New client onboarding
- New account set up, maintenance and reporting
- Tech vendor management
- Client billing set-up and invoicing
- Accounts payable and receivable
- Partnership administrative duties

QUALIFICATIONS

- HS Diploma or Equivalent
 - 3-5 years of industry experience
- Bachelor's Degree
 - 1 year of industry experience preferred
- Competent in the Microsoft Office suite
 - Microsoft Word
 - Mail merges, template design, and other basic functionality.
 - Microsoft Excel
 - Pivot tables, formula building, and other basic functionality.
- Process oriented, team focused
- IT education or training preferred
- Vendor management experience a plus
- Shares Fairport Wealth / Luma Wealth's Core Values: Team Over Self, Engaged, Initiative, Continuous Improvement, Empathetic