

Position: Controller/Human Resources Manager

Job Summary

The Controller/HR Manager will play a significant role in deepening and broadening relationships within Parallel Advisors as well as with our vendors and other outside partners.

In the Controller role, the successful candidate will oversee all financial and accounting activities. This person will be responsible for budget management, financial analysis, payroll, accounts payable, and financial reporting. The Controller will also be charged with the critical responsibility of quarterly client billing. In the HR Manager role, key areas within the human resources department will be administered in conjunction with senior management, including policy and procedure compliance and development and maintenance of HR practices.

The Controller/HR Manager will report directly to the President/Chief Financial Officer. This is a fantastic opportunity for a professional who thrives in a busy, entrepreneurial environment and is well-versed in working closely with senior management.

Duties and Responsibilities

- Manage and process quarterly client billing via our performance reporting software and our custodial platforms. Work with our Operations Team to ensure accuracy and collections.
- Employ our online bill pay system to process accounts payable and expense reimbursements.
- Use our online accounting software to generate financial reports as needed and for annual tax preparation.
- Generate advisor-specific activity and revenue development metrics for quarterly reporting.
- Prepare performance and asset flow data for quarterly valuation purposes. Update shareholder equity statements based on updated valuations.
- Communicate financial metrics to the President/CFO.
- Manage the preparation and processing of payroll for personnel.
- Assist department managers with hiring staff, including posting jobs online, scheduling interviews, and generating offer letters.
- Implement personnel onboarding and off-boarding procedures.
- Oversee benefits enrollment and management.
- Ensure compliance with HR policies and procedures.

Qualifications

The successful candidate will have the following qualifications:

- Bachelor's degree in Business, Accounting, Finance, or a related discipline.
- Accounting designation or an equivalent combination of related experience and education.
- 5+ years of accounting and/or financial management experience plus 5+ years of human resources experience.

- Effective interpersonal, listening, writing, and communication skills.
- Ability to work closely with senior management within a fast-growing, entrepreneurial environment.

Salary and Benefits

Our Controller/HR Manager can expect a competitive compensation package including:

- Salary based upon experience.
- Opportunity for a discretionary, semi-annual incentive award.
- Ownership eligibility via Parallel's Share Purchase and Sale Program.
- Benefits, including medical, dental, vision, and 401k plans.
- Opportunity for support of professional accreditation and continuing education requirements and other professional development.

Company: Parallel Advisors, LLC

- Parallel Advisors is a fast-growing, independent Registered Investment Advisory firm. We are headquartered in San Francisco CA and have offices in Honolulu HI, Dayton OH, and Denver CO.
- To enhance our clients' futures, we seek to know where they are today and where they want to be tomorrow. That means understanding not only their assets, such as concentrated stock holdings, real estate, and earning potential but also their aspirations, including all of their future financial goals.
- With this information in-hand, we chart, assess, and evaluate different scenarios based upon their unique objectives, risk tolerances, and time horizons. From this insight, we build a financial framework from which all our recommendations – including savings directives, insurance requirements, and investment strategies – flow. This framework provides a repeatable, measurable way to make objective decisions as to how to allocate their assets now and into their future.
- We offer our clients an open array of investment solutions, fee-based, and independent of any proprietary platforms.
- At Parallel, we combine the best advisors and industry-leading technology in collaborative partnership to offer our clients an extraordinary experience.
- Parallel Advisors, LLC is an Equal Opportunity Employer.