

Part-time Operations Professional in Financial Planning Firm
(SAN FRANCISCO: Financial District)

Prospettiva Financial provides financial planning and objective advice to individuals and families by emphasizing diligence and collaboration with other advisors. We assist clients in a counseling role to plan for their future, grow their net worth, and preserve their legacy for the next generation.

We have a unique opportunity for a highly organized and growth motivated person who enjoys working with numbers and maintains acute focus on details. This is a part-time position with flexible hours and the right person can start immediately.

The responsibilities of the operations professional are divided into three distinct areas

1. Trading operations
2. Account maintenance
3. Light bookkeeping and financial recordkeeping

Your duties will include:

- 1) Opening accounts primarily through Charles Schwab Advisor Center
- 2) Facilitating transfers from other financial institutions
- 3) Handling distributions and check requests on behalf of clients
- 4) Assisting with the handling and auditing of securities trades provided by the financial partners
- 5) Maintaining client records through both Schwab Advisor Center and our own internal CRM
- 6) Paying company bills
- 7) Providing data to Quicken to process company payroll
- 8) Monitoring company cash flow
- 9) Updating state and federal licensing and assisting with compliance
- 10) General office tasks associated with a small office
- 11) Periodically assist with marketing and event planning as needed

The right person is self-motivated and ready to take charge. You understand the importance of owning your responsibilities and seeing them through to completion. You enjoy seeing the results of your efforts in improving people's lives.

In order to qualify for an interview with us, you will:

- 1) have completed at least a bachelors' degree
- 2) have prior experience in financial services and a conversational understanding of financial markets
- 3) have excellent written and verbal communications skills
- 4) have a high level of proficiency in using Microsoft Excel
- 5) be professional, punctual, organized, and pay attention to details
- 6) be resourceful and know how to handle responsibilities independently
- 7) an appreciation for the arts, visual, music, theater, film, etc. is appreciated
- 8) some experience with Quickbooks is a plus

This position is part time, 20-30 hours a week. Salary is competitive and commensurate with experience.

Our benefits include a retirement plan with matching contributions, public transportation assistance, and an annual bonus based on increases in revenue and newly acquired managed assets.

Please email your resume and a cover letter to wealthcoaching@yahoo.com

In your cover letter, please complete the following statements and then elaborate on your response:

“During my prior experience in financial services, I made use of the left side of my when I . . . (please provide an example).

I made use of the right side of my brain when I . . . (please provide an example).

Please include a text version of your resume in the body of your email OR attach it as an Adobe Acrobat file.

We look forward to meeting you!