Parallel Advisors, LLC
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Position: Operations Associate – Client Service

Job Description:

The Operations Associate will be joining a fast-growing Registered Investment Advisor firm with a culture of entrepreneurship, education, and collaboration. The Associate will assist in the implementation of new client accounts and the ongoing servicing of existing clients. As a member of the operations team, the Associate will work closely with our financial advisors, clients, vendors, and custodian support teams.

Responsibilities:

- Optimize the client experience as it relates to operations and service in order to drive high satisfaction, quality, and efficiency for both the client and Parallel.
- Manage all aspects of our clients' operational needs within the timeframes committed to by Parallel and within the deadlines established by our custodians.
- Serve as a resource to multiple financial advisors in supporting client relationships.
- Lead or participate in cross-functional group projects to improve quality and efficiency within the teams.

Qualifications:

- Operational knowledge in four key areas: new accounts, cashiering, transfer of accounts, and account maintenance. Two to five years of experience desired.
- Strong organizational, analytical, communication, and interpersonal skills.
- Ability to work effectively in a fast-paced and deadline-oriented environment.
- Capability to manage multiple demands and competing priorities.
- Excellent written and verbal communication skills.
- Broker/Dealer platform experience a plus.

Salary and Benefits:

The Operations Associate can expect a competitive compensation package including:

- Salary based upon experience.
- Opportunity for a discretionary, semi-annual incentive award.
- Benefits including health care, 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, measureable 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.