



OPERATIONS ASSOCIATE

The Bulfinch Group provides comprehensive financial strategies carefully tailored to each individual situation. Our goal is to make a lasting, positive impact on the lives of our clients and associates, and on the communities in which they live.

To advance that effort, we seek an **Operations Associate** to handle processing and servicing of all broker-dealer related business. This individual is responsible for the day to day administrative duties necessary to respond to inquiries from advisors, advisors' administrative assistants, and clients, as well as handling all operational issues that arise from the existing client base or new client onboarding.

The successful candidate will demonstrate the ability to:

- Master proprietary electronic systems for client onboarding, transaction processing and account monitoring;
- Communicate effectively with internal and external clients to ensure timely and seamless service
- Triage issues, step in to provide support for advisors without administrative assistants
- Maintain complete and accurate transaction logs
- Work with firm and home office personnel and resources to identify and provide value-added training to advisors and administrative staff

Strong attention to detail, good listening skills, ability to remain calm under pressure, and working knowledge of Office 365 products required. College or business school degree, and/or prior experience in the financial industry preferred; prior experience with Pershing LLC, NetX360, Series 7 a plus. Interested candidates should forward resume to terry_stramowski@bulfinchgroup.com.