

Position Description – Business Operations Specialist

Role: Business Operations Specialist (Coordinator level)

Reports to: CFO

Location: 10 Bay Road, Hadley MA 01035 – in-person, flexibility for hybrid arrangement

Prerequisite

Qualification: Undergraduate degree; finance/economics preferred but not required

Responsibilities:

Supports and optimizes efficient flow of business to ensure key processes are managed and client experience is expeditious, pleasant and productive. The role involves collecting, organizing and distributing a range of information including confidential private data. Critical processes for which the **Business Operations Specialist** is directly responsible include the following:

1. Client Relations

- Schedule calls, conferences or meetings among prospects, clients & professional staff.
- Support Planners' process by coordinating with para-planners to ensure efficient onboarding of new planning and Investment clients, intake of initial materials and regular update of statements & reports that support plan updates/revisions & renewals

2. Business Processing

- Gather and advance documentation associated with investment recommendation & illustrations; support smooth completion of investment implementation & funds transfers
- Provide resources, facilitate completion, collection, and processing of essential documentation supporting investment, insurance and financial planning recommendations to ensure and expedite implementation of decisions.
- Support processing and administration/intake & scheduling for Life Insurance, Long Term Care policies, etc.

3. Office Management

- Greet walk-ins and in-person Client/Advisor appointments, order supplies, coordinate with property maintenance team, get/sort mail, deposit checks, etc.

Skills & Experience:

- Highly organized, detail oriented; project management experience a plus
- Exposure to financial planning/advisory, wealth management, consulting, or customer service workplace and processes a plus
- Professional and friendly interpersonal skills
- Comfortable with math and light accounting
- Adept with Office applications and tools
- Ready and willing to learn

Compensation: Commensurate with experience

Make Inquiries to: info@davidfinancialgroup.com

Additional:

*Subject to background check incl. FINRA NRF process review
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