

Position Overview

Econ Wealth Management is seeking a highly organized and detail-oriented *Operations Associate* to support the firm's day-to-day client service and operational functions. This role is essential to maintaining efficient workflows, accurate records and a seamless client experience. Our ideal candidate thrives in a structured, process-driven environment, values precision, and takes pride in delivering consistent, high-quality operational support.

Annual Salary Range: \$50,000 - \$60,000

Job Type: Full Time

Hours: Mon- Fri | 8:30am-4:30pm [occasional extended hours may be required depending on need]

KEY BENEFITS

- Discretionary Bonus Opportunities
- Healthcare Supplement
- Retirement Plan Eligibility
- Paid Vacation

REQUIREMENTS

- High school diploma or equivalent.
- Minimum one-year related experience in client services, operations, or administrative support [finance related experience preferred].
- Strong attention to detail and organizational skills.
- Ability to manage multiple tasks and meet deadlines.
- Able to adapt to changes in the work environment, handle challenging demands and work with frequent changes or unexpected events.
- High level of integrity and commitment to confidentiality.
- Work well in a team environment.

CORE COMPETENCIES

- Attention to Detail
- Organization
- Accountability
- Communication
- Process-Oriented Mindset

WHY JOIN ECON WEALTH MANAGEMENT?

- Collaborative and team-oriented environment
- Opportunity to play a key role in firm operations and client experience
- Exposure to all aspects of a growing wealth management firm
- Strong commitment to professionalism, compliance, and client service

Job Responsibilities

The following responsibilities outline the core functions of the Operations Associate role and how this position supports both client service and internal operations. While not exhaustive, these duties represent the primary areas of focus and contribution. The ideal candidate will approach these responsibilities with a high level of ownership, accuracy, and consistency.

CLIENT ACCOUNT ADMINISTRATION

- Assist in new account openings, transfers, and account maintenance requests.
- Track and follow up on pending account requests to completion.
- Assist in handling client service requests, including money movements and account updates.

OPERATIONS & DATA ADMINISTRATION

- Maintain accurate client records across CRM and firm systems.
- Generate client reports and assist with data integrity checks.
- Identify and resolve discrepancies in a proactive manner.

PROCESS IMPROVEMENT & WORKFLOW MANAGEMENT

- Help develop and refine operational processes to improve efficiency and scalability.
- Support client onboarding to ensure a smooth and professional experience.
- Assist in preparation and organization of client meeting materials and documentation.

TEAM & OFFICE SUPPORT

- Provide general administrative support to advisors and leadership.
- Assist with client events, workshops, and firm initiatives.
- Help maintain an organized & professional office environment.