

## OPERATIONS AND OFFICE MANAGER

### THE OPPORTUNITY

The Operations & Office Manager is responsible for keeping track of the big picture and identifying potential areas of improvement while overseeing day to day operations of the firm.

Leads the development and implementation of operating policies and processes to drive consistency, efficiency and compliance. This includes managing staff and vendors who deliver services such as administrative, marketing, client scheduling, on-boarding and servicing, technology, HR and company finances. Serves as a primary intermediary between day to day operations and firm senior management. Contributes to the long-term strategic vision for the firm.

The Operations & Office Manager must be very organized, accurate, personable, and able to work both independently and as a team member. A dynamic, 'get it done' professional with a warm demeanor, high ethical standards and leadership skills is essential for this position.

Due to the relatively small staff-size of the firm, the Operations & Office Manager has both individual contributor and supervisory responsibilities and must learn and be willing and able to perform a variety of office and operations duties including backing up staff when on breaks or out of the office.

### FIRM OVERVIEW

We are a successful, growing financial planning and investment management firm located in the university town of Davis, CA, just outside of Sacramento. We provide a unique work environment for team members who value doing the right thing while also balancing our personal needs outside of work. For more information about our firm, our approach, and our services, please visit our website at [www.symphonyfp.com](http://www.symphonyfp.com).

### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Long-term planning to create initiatives that further the firm's overall goals and contribute to long term strategy
- Coordinating different staff or teams to foster exchange of ideas and provide cross-team learning opportunities
- Creating and analyzing budgets and financial reports to find ways to minimize expenses while maximizing the firm's value proposition to clients
- Inspiring and motivating staff and vendors to perform at or above expectations
- Partnering with firm management on compliance activities and initiatives
- Communicating with senior management about shifting company priorities and projects
- Identifying potential problems, overlap or points of friction and working to find solutions in order to optimize efficiency, effectiveness, and workplace environment
- Identifying opportunities to expand or shift course in order to take advantage of changes in the market or advances in technology or other related tools
- The above is illustrative; other duties may be assigned.

## SKILLS AND EXPERIENCE

The Operations & Office Manager must hold a bachelor's degree or higher, or an equivalent of education and training, ideally in operations management, business or a related field. Direct experience in a financial planning or related firm is a huge plus, however experience in a professional regulated environment is essential. 3-5 years of experience, including staff supervision and vendor management, is required. A current CA driver's license and proof of auto insurance are required.

### THE IDEAL CANDIDATE POSSESSES THE FOLLOWING SKILLS:

- "Big picture" thinking, which is key to addressing top-level concerns and finding the best path forward from the available information
- Excellent communications skills with management, clients, staff and vendors
- A thorough understanding of financial and budgeting processes and principles to assess the company's earnings and spending to find areas available to enhance profitability and team member and client experience
- Experience effectively managing staff and vendors who deliver IT, Marketing, HR, Client, Financial, Administrative and other critical functions
- Strong personal and professional judgment
- Adaptability, enabling the ability to respond quickly to a shifting reality and adjust initiatives and priorities accordingly
- Organizational skills and the flexibility to jump from priority to priority, which are essential to a role that juggles a variety of functions and projects.

To perform this job successfully, an individual should be very technologically adept and proficient in Microsoft Office Suite of products and Adobe Acrobat. Must be proficient in general Microsoft Windows navigation and file systems and have good familiarity with a windows server environment including permissions. Prior experience with or ability to quickly learn customer relationship management programs such as Salesforce CRM is needed. Knowledge of basic office equipment and technology should include: Internet and email, scan, copy and fax machines, and VoIP telephone. Other software and web-based programs used include Zoom, Skype, screen capture programs, Mail Chimp and Facebook.

## SALARY & BENEFITS

- Competitive salary based on experience and qualifications with an opportunity to increase salary over time
- Paid holidays and vacation
- Benefits include subsidized Medical, Dental, Vision and Life Insurance
- 401(k) retirement and profit-sharing plan
- Education and training opportunities

**To apply for the position please send cover letter and resume to Debra at [finance@symphonyfp.com](mailto:finance@symphonyfp.com)**

**Selected candidate will be required to pass a pre-employment drug test and background check.**

**Symphony Financial Planning is an equal opportunity employer.**