Punch

A BOUTIQUE INVESTMENT ADVISORY

Wealth Strategies Group

Client Service/Operations Associate

Employee Status: Full Time
Travel: No
Primary Location: Edina, Minnesota

Punch & Associates is a Minneapolis-based, independent wealth and investment management firm serving a select number of institutions and families of substantial wealth.

Description:

Founded in 2002, Punch & Associates is a nationally recognized, independent wealth management boutique with a strong history of delivering exceptional investment performance, highly customized wealth planning, and intimate client service. Our risk-averse investment philosophy is centered on preserving and growing our clients' assets. Our team of seasoned professional advisors enables our clients to pursue their varied and rewarding life interests, both personal and professional. Our core values are:

1. Aiming past the target;
2. Having diligence and persistence in our work;
3. Displaying humility in our interactions;
4. Building the company for permanence; and
5. Maintaining a fun place to work.

The Operations Associate is a full-time salaried position with annual discretionary bonus potential. The ideal candidate will handle daily operational tasks within a team environment, be comfortable communicating with clients, and have a creative, problem-solving approach. The position requires interest in continuous process improvement and collaborating with others.

Responsibilities:

- Navigate SunGard, WealthAccess, SalesForce, and the Advent suite, including APX and Moxy;
- Respond to inquiries from clients, advisors, and consultants;
- Onboard new clients, process incoming transfers, open and close accounts;
- Maintain accounts, including establishing and monitoring systematic investments and withdrawals, monitoring cash requirements, processing journals and transfers, handling required minimum distributions for tax-deferred accounts, processing charitable giving requests, monitoring account registration, and assisting with internal account reconciliation and bill pay;
- Prepare quarterly performance reports and assist with private fund account recordkeeping;
- Prepare client-facing information; and
- Collaborate proactively with colleagues to improve operational processes and assist with general office tasks and company events when needed.

Qualifications:

- Advanced understanding of performance measurement concepts;
- Knowledge of investment operational applications, including investment accounting, reconciliation, and performance analytics systems;
- Excellent organizational skills and attention to detail;
- Confident communication skills with both colleagues and clients;
- Ability to navigate time sensitive projects;
- Comfortable learning new technology systems;
- Proactive, problem-solving approach; and
- Desire to collaborate with others.

Education/Experience:

- Bachelor's degree from accredited institution; and
- Minimum 5 years of experience in the investment and wealth planning industry.

Interested candidates please email resume to info@punchinvest.com.