

## **Operations Analyst Punch & Associates Investment Management, Inc.**

*Punch & Associates Investment Management, Inc. is a Minneapolis-based, independent wealth and investment management firm serving a select number of institutions and families of substantial wealth. Our mission is to enable families and institutions to steward resources with clarity and purpose.*

We are seeking a full-time Operations Analyst to join our dynamic Operations group.

### **Accountabilities Include:**

- Reinforcing clients' trust in Punch by providing reliable, expedient, and accurate service. By making operations transactions a non-event for clients, the Operations Analyst allows clients to focus on the bigger picture issues, such as the purpose of their money.
- Alleviating the account driven administrative burden on wealth advisors.
- Continually improving the ops "flow" by collaborating in an ongoing dialogue about processes and best practices within the operations team.

### **Responsibilities Include:**

- Prepare, process, and complete all client forms and applications to support ongoing account maintenance, including:
  - Opening, closing and retitling accounts;
  - Transferring assets;
  - Updating account preferences and detail;
  - Money movements (deposits, withdrawals, EFT's, wires, checks and journals);
  - Gifts of stock, QCDs.
- Collaborate with advisors for proper client on-boarding and account set-up, including:
  - Monitor account activity for updates on asset flows, account modifications and other account alerts;
  - Provide requested tax documents for clients and tax preparers;
  - Assist with quarterly reporting process.
- Maintain data entry in software pertaining to client accounts including APX, Sungard, Moxy, and Black Diamond Link.
- Client assistance/education in using online interfaces.
- Manage client RMDs.
- Manage client periodic withdrawals/periodic investments.
- Other Operations duties as needed.

**Necessary Skills and Qualifications:**

- Strong attention to detail a must.
- Ability to work in a fast-paced environment with tight deadlines.
- Self-motivated with ability to work both independently and collaboratively in a team environment.
- Excellent communication skills, both internally and externally.
- Strong organizational and time-management skills.
- Ability to work with discretion and uphold confidentiality.
- Bachelor's degree preferred.
- CTFA (Certified Trust and Fiduciary Advisor) certification preferred.
- Experience in the Investment or Wealth Management fields preferred.

Punch & Associates offers a competitive salary, people-first culture, and generous benefits package. Please submit a cover letter and resume to [resumes@punchinvest.com](mailto:resumes@punchinvest.com).