

Punch

A BOUTIQUE INVESTMENT ADVISORY

IT & Security Manager

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 looking for a hands-on, service-oriented IT & Security Manager to support the internal employee day-to-day technology experience at Punch.

This person will be our firm's primary point of contact for technology — responsible for user support, Microsoft 365 administration, and supporting our cyber security initiatives — working alongside our outsourced IT partner, who will continue to manage our network and servers. You will report to the Director of Technology, who leads technology strategy.

This is a player-coach role at a 36-person firm. We are a small team, and part of every week is spent solving problems for people who do not think about technology the way you do. The ideal candidate brings well-rounded experience spanning technology support, administration, and security, an ability to move between solving immediate problems and improving the system behind it, a genuine interest in owning technology across the broader Punch organization, and exceptional interpersonal and communication skills

Responsibilities Include, but are not limited to:

User Support & Service

- Serve as the firm's primary point of contact for day-to-day technology support
- Implement and manage a ticketing and intake process, with clear response expectations and visibility
- Own employee onboarding — device setup, account provisioning, access assignment
- Support conference room AV and hybrid meeting technology so that client and internal meetings run without friction
- Train and enable employees to maximize the use and functionality of the tools we already own

Microsoft 365, Active Directory & Identity Administration

- Administer our Microsoft 365 environment — Exchange and Outlook, Teams, SharePoint, and Entra ID
- Own identity and access management across the firm: security groups, permissions, MFA, and conditional access policies
- Bring intentionality to our configuration — document why policies exist, retire what we no longer need, and replace inherited defaults with decisions
- Manage software and license inventory, optimizing spend and eliminating unused seats

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- Conduct periodic access reviews across firm systems

Security Operations

- Co-own and drive remediation of findings from the firm's third-party information security assessment, tracking progress and reporting to the Director of Technology
- Administer and co-manage our security stack, including endpoint protection and detection, application control, email security, and email encryption
- Co-own our security awareness program, building phishing simulations and training relevant to a wealth management firm
- Support the firm's incident response program, partnering with the Director of Technology and our Compliance Officer

Vendor & Asset Management

- Work closely with our outsourced infrastructure partner, coordinating priorities and ensuring work is tracked through to completion
- Build and maintain a complete inventory of hardware, software, and SaaS subscriptions
- Develop a hardware lifecycle and refresh plan, and make purchasing recommendations to the Director of Technology

Process, Documentation & Projects

- Document our environment — configurations and standard procedures — so that firm knowledge is shared rather than held by one person
- Establish practical change management for firm systems
- Support technology projects and implementations from planning through rollout
- Contribute to business continuity and disaster recovery planning

Required Skills and Qualifications:

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Who we're looking for:

Cultural fit is imperative at Punch. We value people who take their work seriously without taking themselves too seriously. We are looking for someone who:

- **Is patient and service-minded** - Genuinely enjoys helping people who do not think about technology the way you do, and treats a recurring annoyance as a problem worth solving
- **Is proactive, not reactive** - Fixes the underlying cause rather than closing the ticket, and identifies problems before they become issues
- **Documents by instinct** - If only one person knows how something works, that is a problem to be fixed — including when that person is you
- **Communicates clearly and proactively** - Keeping the team informed without being asked
- **Takes ownership** - Comfortable being the person the firm relies on, and equally comfortable saying when something is outside your depth
- **Has a long-term mindset** - Interested in building something, not just filling a seat

What we offer:

- Competitive compensation commensurate with experience. \$70,000 - \$100,000 salary range, plus discretionary bonus and excellent benefits package
- Participation in firm success as we grow
- A tight-knit, high-trust environment where your work is visible and directly improves how the firm operates
- Genuine ownership in our technology environment, and the latitude to make it better
- Flexible work environment with a collaborative in-office culture in Edina

How to Apply:

Please send a resume and brief cover letter to resumes@punchinvest.com.

We value cover letters that are direct and specific — tell us what draws you to the role and what you would bring to the team. Applications reviewed on a rolling basis.