Blue Barn Wealth
Enrich your life.

Client Services Manager/Director Job Description

Position Overview

Blue Barn Wealth, a fee-only registered investment advisory firm with offices in Orem and the Sugarhouse area of Salt Lake City, is looking for a part-time or full-time Client Services Manager or Director. The firm is at a critical point in its growth and has a vision to help as many purpose-inspired people as possible live a “more simple, intentional, and meaningful life.” The applicant filling this position will handle a wide range of important duties, including managing the full operations of the company. This will include overseeing and participating in the work of and developing efficient processes for the operations team to prepare and submit client paperwork, daily notes of firm activities, and quarter end client reports. In addition, the applicant will help ensure client servicing needs are met in a timely manner by the operations team, including completion of money transfers and wires, scheduling client meetings, remembering key client events, and other activities as needed. The applicant will have the benefit of working with all the Partners and team members of the firm in a collaborative approach to servicing clients, helping with day-to-day operations and other assigned projects. The ideal candidate is someone who enjoys proactively managing a team to ensure the administrative functions and operations of the firm run smoothly. Depending upon experience the position may be at the Manager or Director level. As part of a dynamic and growing team, the Candidate will participate in a company culture where continuous learning is highly valued and input from all employees is encouraged.

Responsibilities

- Service the needs of clients
  - Manage the operations of Blue Barn Wealth
  - Communicate and coordinate with other team members to make sure all the tasks are being completed in a timely manner
  - Communicate with clients as needed (e.g., servicing needs, schedule appointments using Calendar software, email reminders, follow up, etc.)
  - Assist clients with account applications and custodial paperwork
  - Execute client-specific tasks (e.g., transferring money, sending documents, etc.)
  - Be proactive in improving and implementing a process of recognizing key events in clients’ lives (e.g. birthdays, anniversaries, births, deaths)
- Support firm-wide operations
  - Use Orion/Eclipse software to track client information, record investment transactions on some investments, generate investment reports, and help with billing
  - Assist in revising and executing firm compliance program and related tasks
  - Play a key role on the firm operations committee meeting to improve firm processes and workflows.
  - Use Redtail for client relationship management, Levitate for mass communication, and Right Capital for financial planning.
  - Perform other administrative tasks as needed (e.g., answer phones, prepare newsletters, scan documents, invoicing, etc.)
- Assume responsibility on assigned projects when serving on other committees, such as:
  - Discovery Process
  - Financial Planning Area Committees
  - Processes improvement

    - Technology/systems integrations
    - Business Development
    - Marketing Plan
    - Firm Continual Learning

Client Services Manager/Director Benefits

- One-on-one mentoring at a fee-only firm with highly educated Partners; be part of a collaborative team
- Competitive pay based on experience, plus annual team & personal bonus
- 40 hours/week (although open to part-time for right candidate) with flexible arrangement options after completion of training period in office (e.g. potential opportunities to work at home most certain days days of the week, or work 9 days with alternating Fridays off)
- 401k with match with immediate vesting
- Health insurance premiums paid for employee
- Health savings accounts (HSAs) available for employee contributions
- 15 days paid time-off (PTO) plus 9 days paid holiday (when NYSE closed) (pro-rated for part-time)
- Parental leave after working at firm for one year:
    - Four weeks of paid maternity leave (in addition to 12 weeks of unpaid leave)
    - One week of paid paternity leave
- 25% bonus of first year revenue for clients you refer to the firm if you decide to become licensed as Advisor (e.g. Series 65 or CFP® certification)
- Renewal of dues for CFP®, CPA, and CFA certifications, if applicable
- Annual FPA membership ($500 value) plus paid time off to attend all Utah FPA meetings, If applicable
- Culture of continual learning (e.g. biweekly lunch and learns, recommended book list)

Requirements

- Experience managing a team and operations Excellent interpersonal communication, presentation, and financial skills
- Ability to work in a team environment yet also independently in fulfilling assigned tasks/projects
- Positive attitude and proactive in helping with firm needs
- Integrity and confidentiality in dealing with client information
- Proficiency with computer programs, including Microsoft Office and willingness to learn other software programs used by the company
- Strong attention to detail
- Self-motivated and eager to learn
- Experience working in an office environment and financial services industry a plus
- Available to work within firm 8:00am-5pm Monday - Friday schedule (although flexibility to set hours within this timeframe)

*****To apply go to Handshake posting https://uvu.joinhandshake.com/emp/jobs/8495296,** or
email resume to Hyrum Smith, Managing Partner, hyrum@bluebarnwealth.com